

MAIN OFFICE
SACRAMENTO
616 K STREET

EARL WARREN
GOVERNOR

STATE OF CALIFORNIA

LOS ANGELES OFFICE
WASHINGTON BUILDING
311 SOUTH SPRING STREET

DEPARTMENT OF SOCIAL WELFARE

SAN FRANCISCO OFFICE
DAVID HEWES BUILDING
995 MARKET STREET

CHARLES M. WOLLENBERG
DIRECTOR
Sacramento

September 12, 1944

1297

FILED
In the office of the Secretary of State
of the State of California

SEP 14 1944

FRANK M. JORDAN, Secretary of State

[Signature]

MANUAL LETTER NO. 63

The attached manual revisions are to be entered in your copy of the Manual of Policies and Procedures and the revision numbers cancelled on the separators for the revised chapters. Revision numbers are listed for the seven chapters as follows:

Welfare Personnel Standards	Revision 55
Purpose and General Provisions	Revision 25
Residence	Revision 39
Investigation and Decision	Revisions 33, 34
Continuing Services	Revisions 30, 31
Special Services	Revisions 13 thru 15
Financial Procedures	Revision 80

These revisions were approved by the Social Welfare Board on August 25, 1944.

Sec. 072-30, Examination Records, eliminates the former requirement of the twenty-five cent fee for inspection of examination papers by Merit System competitors.

In Sec. 120-32, Residence of Married Woman Under OAS Law, a case example has been added for clarification.

Sec. 250-00, Disposal of Applications, sets up a new procedure covering the use of new Form DPA 8, Notice to Applicant Who Withdraws Application. Supplies of this form are available free of charge upon request to the SDSW.

Sec. 352-25, Notification of SDSW of Completion of Reinvestigation, revises the procedure for reporting Completion of Reinvestigation to the SDSW. The Individual Certificate of Reinvestigation of Eligibility (Form Ag, B1, CA 207) has been obsoleted. Henceforth, completion of all reinvestigations are to be reported to the SDSW on List Certificate of Reinvestigation of Eligibility, (Form Ag, B1, CA 208), and the cases reported are to be listed in numerical sequence.

Sec. 674-05, Claims For the Return of Erroneous Repayments, has been revised to include recent interpretations on return of erroneous collections. On July 29, 1944, formal notice was received from the Social Security Board reversing former policy

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relating to Federal participation in the return of erroneous collections. Heretofor there has been no Federal participation in erroneous repayments which were made on the basis of alleged ineligibility to one or more partial monthly grants. According to the latest ruling now incorporated in Sec. 674-05 Federal reimbursement will be allowed on the return of erroneous collections, irrespective of whether the collection related to alleged ineligibility for one or more partial monthly grants or to the full grant for one or more months. Likewise there will be Federal reimbursement in returns which are made to the executor of a deceased recipient's estate as well as those cases in which the return is made to a payor who was not the recipient but who made the payments for the benefit of the recipient.

STATEMENTS CONTAINED IN THE MANUAL TAKE PRECEDENCE
OVER SAME MATERIAL PREVIOUSLY RELEASED IN BULLETINS

073-00 (Continued)

073-00

shall establish such geographical or district eligible lists as directed by the SSWB to include all names of eligibles who reside within a specified district. Examining agency shall also maintain Statewide eligible lists.

For the purpose of preparing a county employment list, an individual will be deemed to be a resident of a county if, at time of establishment of the eligible list, he has resided for a continuous period of at least ninety days in that county. Or, in the event that the individual has not resided continuously in that county for at least ninety days immediately preceding establishment of the employment list, he shall be deemed to be a resident of the county if he can establish the fact that he is a member of the electorate of that county.

However, if an individual changes his residence from one county to another after the employment list has been established, he may have his name placed on the county employment list for the county of his new residence, provided, that he makes such a request and presents satisfactory evidence to the examining agency that he has resided in that county for a continuous period of ninety days, or is a qualified elector of that county. The name of one individual shall not appear on more than one county employment list at the same time for any one or several classifications of employment.

If a vacancy exists in a class of position for which there is no appropriate eligible list, examining agency with approval of the SSWB may prepare an appropriate eligible list for the class from one or more existing related eligible lists. For this purpose examining agency shall select eligible lists for classes for which minimum qualifications and examinations are similar to or higher than those required for class in which vacancy exists. (W&IC 119.5, 119.6; FSSB)

073-05 DURATION OF ELIGIBLE LISTS

073-05

WPS

Each eligible list shall remain in effect at least one year from the date of its establishment and thereafter until exhausted or replaced by a more recently prepared list for the class.

An eligible list may be deemed by examining agency to be exhausted if fewer than three available eligibles remain on the eligible list.

Notice of intention to abolish an eligible or promotional eligible list upon completion of a new examination shall be sent to all eligibles whose names appear upon the list to be abolished.

It shall be the duty of the SDSW to notify examining agency as far in advance as possible of vacancies which may occur in a county agency. Within these rules, examining agency shall be responsible for determining adequacy of existing eligible lists and for establishment and maintenance of appropriate eligible lists for all positions in the agencies exclusive of exempt positions.

(W&IC 119.5, 119.6)

072-30 EXAMINATION RECORDS
WPS**072-30**

All examination papers submitted by competitors are property of examining agency and are confidential records which shall be open to inspection only for such purpose and under such conditions as follows:

1. On written request to the examining agency, any competitor may within thirty days after the date on which the Notification of Test Results of such examination was mailed to him inspect his papers at such time and place and under supervision of such person as examining agency may designate.
2. A competitor's papers shall be open to inspection only by himself, his attorney when authorized in writing, and appointing authority (or his authorized representative) to whom competitor's name may be certified for appointment.
3. Unauthorized copying of questions or answers by any person from any paper made available for inspection is forbidden and may result in cancellation of eligibility and disbarment from future examinations.
4. Examining agency may approve such conditions as to time, place, manner, and frequency of inspection as in its judgment may be necessary to prevent abuse of this privilege.

Applications and other necessary examination records shall be kept during life of the eligible list. Examination records of appointees shall be kept for a reasonable period of time, but examination records of other applicants, not appointed may be destroyed thirty days after the eligible list expires or in accordance with practice of examining agency.

All notices of changes of address shall be filed by applicants and eligibles with examining agency. (See Sec. 076-50, APPEAL FOR REVIEW OF EXAMINATIONS.) (W&IC 119.5, 119.6)

073-00 ESTABLISHMENT OF ELIGIBLE LISTS
WPS**073-00**

After each examination, examining agency shall prepare an eligible list of persons who qualified. Names of such persons shall be placed on the eligible list in the order of their final ratings starting with the highest. If two or more eligibles have final ratings which are identical their names shall be arranged on eligible list in the order of their ratings on the chief essential of the examination.

In order to assist county agencies in appointing county residents to positions whenever possible, examining agency shall establish eligible lists containing names of eligibles who reside within a given county. Examining Agency

(Section Continued on Next Page)

**101-25 PURPOSE AND CONSTRUCTION OF ANC LAW
ANC****101-25**

In passing legislation providing for ANC, the State has recognized its responsibility for the protection and care of children whose dependency is due to certain circumstances beyond their control.

The law provides for assistance for the care of children in order that they may remain in their own homes or with their own relatives when they have been deprived of the support of their parents. The best possible substitute for their own homes must be provided for children in need of foster home care. The law thus recognizes the principle of the importance of family life for every child.

The provisions of the law shall be liberally construed to effect these objects and purposes.

This program is a joint Federal, State, and county undertaking. (W&IC 1503, 1507)

**102-00 AID IN OWN HOME
OAS, ANB, APSB, ANC****102-00**

In OAS, ANB, and APSB aid shall be granted to a person in his own or in some other suitable home of his own choosing, in preference to placing him in an institution. (W&IC 2005, 3075, 3460)

The object and purpose of ANC is to keep children in their own homes wherever possible. The best possible substitute for their own homes shall be provided for children who must be given foster care. (W&IC 1503)

**102-10 CARE OF CHILDREN
ANC****102-10**

No public official, agent or representative shall be authorized, in carrying out any of the provisions of the ANC law, to take charge of any child over the objection of either of the parents of such child, or of the person standing in the place of a parent to such child, except pursuant to a proper court order. (W&IC 1502)

**102-15 CUSTODY OF RECIPIENT
OAS****102-15**

No OAS recipient shall be considered in the custody of the State, or any subdivision thereof, by reason of such aid, or subject to control in his manner of living by State or county officials or employees of the county in which he shall reside, save when adjudged incompetent to care for himself by proper tribunal or when admitted to a State or county hospital for medical attention, when he shall be subject to the rules of the institution in the same degree as other patients. Nothing contained herein shall prevent the payment of aid to any responsible person acceptable to the recipient for the benefit of the recipient, as provided elsewhere in the OAS law. (W&IC 2193)

**101-05 PURPOSE AND CONSTRUCTION OF OAS LAW
OAS****101-05**

The purpose of the OAS law is to provide for aid to the needy aged residing within the State.

The OAS law contemplates a cooperative program of Federal, State, and county aid to provide assistance to aged persons who are without adequate resources for their own care.

The provisions of the law shall be liberally construed. (W&IC 2001, 2003)

**101-15 PURPOSE AND CONSTRUCTION OF ANB AND APSB LAWS
ANB, APSB****101-15**

The purpose of the APSB law is to provide a plan whereby blind residents of this State may be encouraged to take advantage of and to enlarge their economic opportunities, to the end that they may render themselves independent of public assistance and become entirely self-supporting. To achieve this objective, resources and income beyond the necessities of bare decency and subsistence are required. The retention of necessary income and resources by those blind persons who show a reasonable probability of being able and willing to undertake the acquisition of resources and income necessary for self-support will encourage them in their efforts to become self-supporting.

The ANB law is an expression of California's recognition of the fact that blindness often makes it impossible for an individual to support himself. At the same time, it may make his need for security much greater than that of persons with unimpaired vision.

While there may be other causes which contribute to the need of the applicant or recipient, if blindness is another and separate condition by reason of which a person is unable to provide himself with the necessities of life, aid to the blind may be allowed.

The Federal, State and county governments participate financially in the ANB program while State and county governments only participate in the APSB program.

The provisions of both the ANB and APSB laws shall be liberally construed to effect their objects and purposes. (W&IC 3001, 3400, 3401)

**120-32 RESIDENCE OF MARRIED WOMAN UNDER OAS LAW
OAS****120-32**

A woman applicant for OAS may establish her own separate residence if she is in fact living separate and apart from her husband. (W&IC 2161)

EXAMPLE A: HUSBAND IS LIVING IN COUNTY A, WIFE IS APPLYING FOR OAS IN COUNTY B. INVESTIGATION REVEALS THAT WIFE CAME TO COUNTY B IN 1935 INTENDING TO MAKE HER RESIDENCE THERE. WIFE IS RESIDENT OF COUNTY B, APPLICATION IS GRANTED BY THAT COUNTY IF SHE IS OTHERWISE ELIGIBLE.

EXAMPLE B: WOMAN CAME TO CALIFORNIA IN JANUARY, 1937, AND HAS REMAINED HERE CONTINUOUSLY WITH INTENT OF MAINTAINING HER RESIDENCE IN CALIFORNIA. HUSBAND JOINED HER IN CALIFORNIA IN 1939. WOMAN APPLIES FOR OAS IN FEBRUARY, 1942, AND HAS COMPLETED THE REQUIRED PERIOD OF STATE RESIDENCE AT THAT TIME.

EXAMPLE C: HUSBAND AND WIFE ESTABLISHED RESIDENCE FOR OAS IN CALIFORNIA, AND BOTH WERE GRANTED AID. THE HUSBAND MOVED OUT OF THE STATE WITH INTENT TO RESIDE ELSEWHERE. THE WIFE REMAINED IN CALIFORNIA. HER RESIDENCE IS IN CALIFORNIA AND HER RESIDENCE ELIGIBILITY CONTINUES FOR PURPOSES OF THE OAS LAW. (W&IC 2140, 2161)

**120-30 RESIDENCE OF MARRIED WOMAN
OAS, ANB, APSB, ANC****120-30**

Under the general laws, residence of the husband determines that of the wife and the residence of an adult or minor married woman follows that of her husband. If the husband dies, the widow, though still a minor, would determine her own residence. A husband, however, is deemed to reside where his family has residence unless he establishes a separate residence elsewhere by act and intent.
(POL C 52)

The foregoing is not intended to imply that a woman, upon marriage, assumes her husband's prior length of residence. Such a woman would not be eligible to aid unless she personally had met residence requirements set forth in the specific category of aid for which she is applying.

Specific exceptions to the general principles mentioned in the preceding paragraph are written into the laws governing OAS, ANB, APSB, and ANC. These exceptions are discussed in Sec. 120-32, Residence of Married Woman Under OAS Law; in Sec. 120-33, Residence of Married Woman Under ANB and APSB Laws, and in Sec. 122-10, ANC--Determination of County of Residence. (W&IC 1560, 2161, 3042.10, 3075, 3433, 3460)

**120-45 RESIDENCE OF INCOMPETENTS
OAS, ANB, APSB**

120-45

Incompetency is a finding of the court and is not a factor in determining residence unless:

- (1) a guardian of the person has been appointed, or
- (2) the person has been found incompetent under the provisions of Secs. 5076 or 5078 of the W. & I. C.

The residence of one for whom a guardian of the person has been appointed is the residence of the ward at the time letters of guardianship were issued. Residence of such a person may be changed only by the union of the guardian's intent and some act in relation to the ward such as the ward's removal to another county. (W&IC 2140, 3075, 3460; PROB C 1460, 1500)

For residence while in or on parole from a public custodial or correctional institution see Secs. 124-30, Residence While in Public Custodial or Correctional Institution, 124-35, Residence While on Parole, and 230-60, Guardianship. (W&IC 2140, 3075, 3460)

**121-00 STATE RESIDENCE, GENERAL
OAS, ANB, APSB, ANC**

121-00

State residence is a requirement for eligibility to OAS; for eligibility to ANB and APSB, either at the time of becoming blind or during a specified period prior to application; and for eligibility to ANC for all children not born in California. (W&IC 1525, 2160, 3040, 3041, 3042, 3043, 3075, 3430, 3431, 3432, 3460)

**121-05 STATE RESIDENCE--OAS
OAS**

121-05

All applicants for OAS, to be eligible to this aid, must reside in this State and have so resided continuously for at least one year immediately preceding date of application and for a total of five years which may be cumulative within the nine years immediately preceding date of application. (W&IC 2140, 2160)

**120-33 RESIDENCE OF MARRIED WOMAN UNDER ANB AND APSB LAWS
ANB, APSB****120-33**

For the purpose of receiving aid under ANB or APSB law, neither the domicile nor residence of husband or wife shall be deemed to be the residence or domicile of the other. Each may have a separate residence or domicile, dependent upon proof of the fact and not on legal presumptions. In other words, in the absence of proof that husband and wife have separate residence status, they may be presumed to have but one which would be determined in accordance with the general laws regarding residence. (See Sec. 120-30, RESIDENCE OF MARRIED WOMAN.) (W&IC 3042.10, 3075, 3433, 3460)

**120-35 RESIDENCE OF ILLEGITIMATE CHILD
ANC****120-35**

The mother of an illegitimate unmarried minor is entitled to its custody in the absence of court action to the contrary.

If the mother is an unmarried minor, her county residence would be determined by the parent, guardian or court having custody, and her residence would determine that of her child or children.

ANC State residence requirements may be fulfilled by child's California birth, by child's physical presence in California for year immediately preceding date of application, or by mother's residence in California for year immediately preceding date of application. If paternity has been established, ANC State residence may be established by the father. (W&IC 1525, 1526)

237-75 (Continued)

237-75

the total grant for all children. If ineligibility has been established for a child or for children on the first Form CA 201, do not include them in Items 14 and 15 of the second Form CA 201.

Example: Application is made for ANC for Sally, John and Mary Jones with the mother as payee. Birth evidence cannot be obtained immediately for Mary. Form CA 201 is completed for Sally and John. Mary's name does not appear on this certificate. When eligibility is subsequently established for Mary and the mother remains the payee, an additional Form CA 201 is completed. Items 12, 13, 14, and 15 include all three children.

Items 14 and 15 on the first Form CA 201 are completed thus:

14. CERTIFICATION AND RECOMMENDATION:

A. Sally and John qualify for Aid to Needy Children and I
(Names of Children)
recommend that aid be granted in the amount of \$ 67.50.

15. Approved by the Board of Supervisors of xxx County this 6th day
of June, 1942, for Aid to Needy Children for Sally and John
(Names of Children)
in the amount of \$ 67.50. Aid to begin on the 1st day of
June, 1942. Aid to Needy Children grant \$ 45.00, county
supplemental aid in the amount of \$ 22.50.

Items 14 and 15 on the second Form CA 201 are completed thus:

14. CERTIFICATION AND RECOMMENDATION:

A. Sally, John and Mary qualify for Aid to Needy Children and I
(Names of Children)
recommend that aid be granted in the amount of \$ 67.50.

15. Approved by the Board of Supervisors of xxx County this 6th
day of July, 1942, for Aid to Needy Children for Sally, John and Mary
(Names of Children)
in the amount of \$ 67.50. Aid to begin on the 1st day of
July, 1942. Aid to Needy Children grant \$ 67.50. County
supplemental aid in the amount of \$.

When additional children in a family are placed on aid by a subsequent Form CA 201 and the payee is not the same as for the children currently receiving aid, Item 12 or 13, Assistance Plan, shall be completed for the additional child or children only. Items 14 and 15 shall include only the names of the additional child or children and shall show only the grant for the additional child or children. (W&IC 1560)

EXAMPLE: APPLICATION IS MADE FOR ANC FOR JAMES, JOSEPH AND RICHARD SMITH WITH THE MOTHER AS PAYEE. BIRTH EVIDENCE CANNOT BE OBTAINED IMMEDIATELY FOR RICHARD. FORM CA 201 IS COMPLETED FOR JAMES AND JOSEPH. RICHARD'S NAME DOES NOT APPEAR ON THIS CERTIFICATE. WHEN ELIGIBILITY IS SUBSEQUENTLY ESTABLISHED FOR RICHARD, A BOARDING HOME MOTHER IS TO BE THE PAYEE FOR HIM WHILE THE MOTHER REMAINS THE PAYEE FOR JAMES AND JOSEPH. ITEMS 12 AND 13 OF THE SECOND FORM CA 201 REFER TO RICHARD ONLY. HIS NAME AND HIS GRANT ONLY ARE RECORDED IN ITEMS 14 AND 15.

237-75 (Continued)

237-75

- 13A. Assistance Plan--Board and Care Basis for Determining Need--Record (1) the amount charged for care of child/ren; (2) total contribution from parents for care of child/ren; (3) other income to child/ren; (4) deficiency, i.e., the difference between the charge for care and the total contributions; (5) the ANC grant.
- 13B. Verification and Explanation of Assistance Plan--(1) Where amount needed for the child's care outside of its own home is determined by county investigation and there is no documentary evidence obtainable, indicate means of verifying amount needed; e.g., by home visit, correspondence, etc. (2) Cross reference to Item 11B. (3) Explain source of other income. (4) and (5) No recording required.
14. Certification and Recommendation--Certification and recommendation is made after verification by investigation as established by evidence on file in county office and in accordance with rules and regulations of SDSW.
- A. Fill in names of children who qualify for aid with amount of aid recommended.
- B. Fill in names of children who do not qualify for aid, and reason.
- Signature of county investigator (i.e., public assistance worker) and/or case supervisor or county welfare director is entered upon Form CA 201 on completion of investigation. All signatures shall be original or facsimile signatures. Date is date of signing certificate.
15. Approval by Board of Supervisors--Name of county, date of action, names of children granted aid, the total amount of aid approved, and date of beginning aid shall be indicated. Signature of county clerk or deputy shall be original or facsimile signature.
16. Denial by Board of Supervisors--Name of county, date of action, names of child or children, and reason for denial shall be entered here with signature as above.
17. This section is completed by the State.

When additional children in a family are placed on aid by a subsequent Form CA 201, and the payee is the same as for the children currently receiving aid, Items 12 and 13 relating to the assistance plan shall be completed for all children including those on the first Form CA 201. Items 14 and 15 shall include the names of children on the first Form CA 201, currently receiving aid, and the names of the child or children on the second Form CA 201, and shall show

(Section Continued on Next Page)

250-00 (Continued)

250-00

to be ineligible or for some other reason wishes the investigation discontinued. The reason for the applicant's withdrawal, if known, should be recorded in the county record.

Notice to Applicant Who Withdraws Application (Form DPA 8) shall be given or mailed to the applicant who withdraws his application except for counties in which the board of supervisors takes denial action on withdrawn applications. A copy of the notification shall be retained in the case record.

When a withdrawn application is denied by the board of supervisors, the applicant shall be notified of this action on Form Ag, Bl, CA 239 (Notification of Action by Board of Supervisors), in accordance with the provisions of Sec. 250-10, Reporting Action of the Board of Supervisors to Applicant. (See Form DPA 8 IN SEC. 250-99, FORMS USED IN INVESTIGATION PROCEDURES.) (W&IC 1550, 1560, 2140, 3075, 3084, 3085, 3460, 3472)

250-00 DISPOSAL OF APPLICATIONS
OAS, ANB, APSB, ANC**250-00**

The board of supervisors shall as the final step in the investigation grant or deny the application (Form Ag, Bl, CA 200). In ANC, when application is filed for a family group in which some children qualify for aid and others do not qualify, the county may grant aid for the eligible child or children and at the same time deny aid for the ineligible child or children.

When aid is granted, the board of supervisors shall specify the amount of aid and the date on which it is to begin. (See Sec. 611-50, BEGINNING DATE OF AID--NEW APPLICATIONS.) When proof of ineligibility has been obtained or when by diligent investigation all reasonable sources of proof of eligibility have been examined without establishing eligibility, aid shall be denied by the board of supervisors. (W&IC 1511, 1550, 2020.01, 2022, 3084, 3472)

The board of supervisors shall act on the application at the first meeting for consideration of such applications subsequent to receipt of the report of investigation made to them by their designated representative.

In ANC, if the eligibility or ineligibility status has not been determined for one or more of the family group, the county action may be withheld for such child or children until a later date when the investigation has been completed. Include only those children for whom eligibility or ineligibility has been established on the Certificate of Verification of Eligibility (Form CA 201). When evidence necessary to establish eligibility or ineligibility of the remaining child or children named on the Form CA 200 is obtained, another Form CA 201 shall be completed and referred to the board of supervisors for appropriate action.

Aid shall be denied when the applicant's whereabouts are unknown and he cannot be located or when he established residence in another State before the investigation is completed. When an applicant for OAS, ANB, APSB, or the person establishing a child's or children's residence moves and establishes residence in another county before the board of supervisors takes action, the responsibility of the first county ceases. (See Sec. 232-40, CHANGE OF COUNTY RESIDENCE PRIOR TO GRANTING OF AID.)

In OAS, ANB, APSB, action of the board of supervisors is not required when an applicant dies before the investigation is completed. Such applications are considered cancelled.

Action of the board of supervisors is not necessary on withdrawn applications. Any request by the applicant for withdrawal of his application shall be made upon his own initiative and in writing. Withdrawals may occur when the applicant believes himself, or the children for whom application is being made,

(Section Continued on Next Page)

250-99 (Continued)

250-99

State of California

Department of Social Welfare

NOTICE TO APPLICANT WHO WITHDRAWS APPLICATION

Los Angeles County

To:

John Brown
111 Main Street
Alhambra, CaliforniaDate 9/12/44County No. 1234District Alhambra

In accordance with your request of 9/7/44, that your
Date
application be withdrawn, no action has been taken on your application for
Old Age Security. If there should be a change in your circum-
stances or you should again desire to apply for aid, you have the right at any
time to make another application.

Jane Rae

Signature of County Worker

**352-25 NOTIFICATION TO SDSW OF COMPLETION OF REINVESTIGATION
OAS, ANB, APSB, ANC****352-25**

The List Certificate of Reinvestigation of Eligibility (Form Ag, B1, CA 208), shall be used to report the completion of the reinvestigation. It shall be prepared in duplicate by the county and thereon will be listed those cases on which reinvestigation has been completed. One copy of Form Ag, B1, CA 208 remains in the county office, and one copy shall be forwarded to the SDSW. In grouping the cases on Form Ag, B1, CA 208, the county shall list them in numerical sequenc by State number.

These forms certify that eligibility has been reestablished and that supporting evidence is on file in the county record. The certification is prepared after the Affirmation of Eligibility (Form Ag, B1, CA 206) has been signed by the recipient and eligibility has been reestablished. (W&IC 1560, 2140, 3075, 3460)

**352-20 RECORDING OF REINVESTIGATION IN ANB AND APSB
ANB, APSB****352-20**

The results of reinvestigation shall be recorded under County Report of Eligibility Reinvestigation on the reverse of Affirmation of Eligibility (Form Bl 206) or elsewhere in the case record. If the latter, reference shall be made on the reverse of Form Bl 206 to the location of the material in the case record. Instructions for completion of items follow:

- Items 1, 7, 8, 9, and 10 of Form Bl 206 are self-explanatory.
- Item 2. Real property--When circumstances require real property reinvestigation (SEE SEC. 351-15, REINVESTIGATION OF REAL PROPERTY), enter dates of verification and findings here or indicate where such material may be found in the case record.
- Item 3. Personal property--When personal property reinvestigation is required by circumstances (SEE SEC. 351-20, REINVESTIGATION OF PERSONAL PROPERTY), record dates of verification and findings here or indicate where such material may be found in the case record.
- Item 4. Income--For ANB enter all income with verification and source. Under source of "Income" record "Home owned", for every recipient who lives in a home owned outright or in which he has an interest. Record value of use and occupancy as computed in accordance with rules and regulations of SDSW. When there is no net value of use and occupancy, write "none". For APSB enter "Exempt Income" or "Non-exempt Income," according to provisions of law, with verification and source.
- Item 5. Need in excess of \$50 per month--In ANB when aid in excess of \$50 is established, enter the nature of the need which is in excess of \$50 per month with verification of need and amount of same.
- Item 6. APSB--Plan for self-support--When aid is granted under APSB Law, verification of the plan of self-support with date and source of information shall be included on the reverse of Form Bl 206. (SEE SEC. 351-55, DETERMINATION OF ELIGIBILITY UNDER ANB AND APSB PROGRAM.)

The date at the bottom of the form is the date the worker completed the reverse of Form Bl 206.

**353-20 CHANGES IN AID FOLLOWING REINVESTIGATION
OAS, ANB, APSB, ANC****353-20**

When a reinvestigation, either annual or otherwise, indicates a change in the amount of the grant, such change shall be made as soon as administratively possible. A Notice of Change (Form Ag, B1, CA 232) shall be submitted to the SDSW not later than 15 days after action by the board of supervisors. (SEE SECS. 360-25, REASONS FOR CHANGES IN AMOUNT OF AID, AND 362-25, CHANGE IN NEED OR INCOME--NO CHANGE IN GRANT.) (W&IC 1560, 2140, 3075, 3460)

**353-00 OTHER REINVESTIGATIONS
OAS, ANB, APSB, ANC****353-00**

Upon receipt of a report of an alleged resource or other unverified information which raises question regarding a recipient's, or in ANC a parent's or child's, continued eligibility, appropriate investigation shall be initiated promptly. A sustained effort shall be made to complete the investigation within the first month following that in which the report causing the investigation is received. (W&IC 1560, 2140, 3075, 3460)

**353-05 REPORT REQUIRED OF RECIPIENT WHO LEAVES STATE
OAS, ANB, APSB, ANC****353-05**

A recipient of OAS, ANB, or APSB who plans to go or goes to another state and whose aid continues beyond the second month following departure due to "unusual circumstances," shall report before leaving, or not later than two months after departure, his intent with regard to residence. (See Sec. 123-05, CONTINUANCE OF AID WHILE RECIPIENT ABSENT FROM STATE.) He shall also report his living arrangements in the new locality, any change in his income because of the change in living plan, and the contribution, if any, required to cover his share of expense in the household.

When a child receiving ANC accompanies his parent to another state and aid continues beyond the second month following departure, the parent shall comply with these requirements.

In ANC, arrangements shall be made periodically with the welfare department in the locality where the child is living, to contact the recipient to determine that the child is receiving adequate care.

When warrants are mailed out of the State on a continuing basis, the county may verify the whereabouts of the recipients by forwarding occasional warrants by registered mail with a return receipt requested. (See Secs. 123-20, RETURN FROM OUT OF STATE TO COUNTY OF RESIDENCE AFTER AID DISCONTINUED, AND 123-50, LOSS OF STATE RESIDENCE WHILE IN RECEIPT OF AID.) (W&IC 1560, 2140, 3075, 3460)

460-89 OTHER CLAIMS, FOLLOWING DEATH IN SERVICE

460-89

The dependents of a man who dies in the service may be entitled to:

1. INSURANCE

If the man had taken out National Service Life Insurance, his beneficiary is entitled to payments if the insurance was in force. (See Sec. 460-95, NATIONAL SERVICE LIFE INSURANCE FOR SERVICEMEN.) For instance, a beneficiary of a serviceman who was covered by a \$10,000 National Service Life Insurance policy would receive the following payments in the event of the death of the insured serviceman:

If under 30 years of age, a monthly income for 20 years of. . . \$55.10

If 30 years of age, a monthly income for life of. 39.70

If 40 years of age, a monthly income for life of. 45.00

If 50 years of age, a monthly income for life of. 53.90

If 60 years of age, a monthly income for life of. 68.10

Increased benefits for higher ages

(FACTS FOR NAVY MEN-ABOUT NATIONAL SERVICE LIFE INSURANCE, MAY, 1944) IN SOME CASES WHERE THE SERVICEMAN HAD NOT TAKEN OUT ANY INSURANCE, AUTOMATIC INSURANCE MAY BE PAYABLE. (SEE SEC. 460-98, AUTOMATIC INSURANCE FOR SERVICEMEN)

2. PENSION

Dependents of a person who dies in active service are usually entitled to a pension.

3. OLD AGE AND SURVIVOR'S INSURANCE

When a serviceman dies, the possibility that he had credits toward OASI benefits should be checked. If his employment prior to military service was in "covered employment" for the requisite period, it is possible that his dependents may be eligible to benefits under this program. (See Secs. 455-00 THRU 455-70, OLD AGE AND SURVIVORS INSURANCE BENEFITS) (RED CROSS ABRIDGED HANDBOOK OF HOME SERVICE INFORMATION)

460-60 PENALTIES FOR FRAUD UNDER THE SERVICEMEN'S DEPENDENTS ALLOWANCE ACT OF 1942**460-60**

Whoever shall obtain or receive any money, check, or family allowance... without being entitled thereto and with intent to defraud, shall be punished by a fine of not more than \$2,000, or by imprisonment for not more than one year, or both.

Whoever in any claim for family allowance or in any document requiredmakes any statement of a material fact, knowing it to be false, shall be guilty of perjury and shall be punished by a fine of not more than \$5,000, or by imprisonment for not more than two years, or both.

Any person who has been entitled to payment of a family allowance.... and whose entitlement to payment of such allowance has ceased shall, if he thereafter accepts payment of such allowance with intent to defraud, be punished by a fine of not more than \$2,000, by imprisonment for not more than one year, or both.

No part of any amount paid....shall be paid or delivered to or received by any agent or attorney on account of services rendered in connection with any family allowance....and the same shall be unlawful, any contract to the contrary notwithstanding. Any person violating this section shall be deemed guilty of a misdemeanor and upon conviction thereof shall be fined in any sum not less than \$100 nor more than \$1,000. (PUB L 625, 77TH CONGRESS)

460-80 DEATH IN SERVICE--BENEFITS DUE DEPENDENTS**460-80**

Dependents of a man who dies in service are usually entitled to one or more of a variety of benefits, including certain burial expenses, burial flag, etc.

Official notice of death in service is sent by commercial telegraph to the emergency address given by the man on entering service. Notification in any other manner should not be accepted as authentic. (RED CROSS ABRIDGED HANDBOOK OF HOME SERVICE INFORMATION)

460-83 DEATH GRATUITY OF SERVICEMAN**460-83**

Upon death in line of duty, not the result of own misconduct, of an officer, enlisted man, or nurse, a "death gratuity" (six months' pay at rate being received by deceased at death) is payable to widow, children, or other designated beneficiary. Immediately upon official notice of death the military authorities send the necessary forms to the beneficiary. (RED CROSS ABRIDGED HANDBOOK OF HOME SERVICE INFORMATION)

460-86 ACCRUED PAY OF SERVICEMAN**460-86**

Upon official notice of death the finance officer mails to next of kin the required form on which to apply for any pay which was due the man at date of death. This should be filled out and mailed to General Accounting Office, Washington, D. C. If application form is not received by family within a reasonable time after death of man, they may write to The Adjutant General, War Department, or to Bureau of Supplies and Accounts, Navy Department. (RED CROSS ABRIDGED HANDBOOK OF HOME SERVICE INFORMATION)

Monthly premium rates per \$1,000 of insurance follow:

Age	Monthly Premium	Age	Monthly Premium	Age	Monthly Premium
17 - - - - -	\$.64	28 - - - - -	\$.69	39 - - - - -	\$.83
18 - - - - -	.64	29 - - - - -	.70	40 - - - - -	.85
19 - - - - -	.65	30 - - - - -	.71	41 - - - - -	.87
20 - - - - -	.65	31 - - - - -	.72	42 - - - - -	.89
21 - - - - -	.65	32 - - - - -	.73	43 - - - - -	.92
22 - - - - -	.66	33 - - - - -	.74	44 - - - - -	.95
23 - - - - -	.66	34 - - - - -	.75	45 - - - - -	.99
24 - - - - -	.67	35 - - - - -	.76	46 - - - - -	1.03
25 - - - - -	.67	36 - - - - -	.77	47 - - - - -	1.08
26 - - - - -	.68	37 - - - - -	.79	48 - - - - -	1.14
27 - - - - -	.69	38 - - - - -	.81	49 - - - - -	1.20
				50 - - - - -	1.27

Application for National Service Life Insurance may be made by the serviceman at any time after commencement of service with the armed forces. If application is made within 120 days from the date of reporting for active duty, it is not necessary for the serviceman to take a physical examination.

Only members of the serviceman's immediate family may be named as the beneficiary, i.e., wife (or husband), children (including adopted children or stepchildren, parents (including parents through adoption and persons who stood in "loco parentis" to the insured), brothers and sisters (including half-brothers and half-sisters). The beneficiary may be changed at any time.

National Service Life Insurance policies may be continued in force after discharge from the service, i.e., it is not just a temporary war policy. The 5-year Level Premium Term policy may be continued in effect for five years. After one year, and prior to the end of the fifth year, it may be converted to one of the permanent types of government insurance. Thus, the serviceman may secure for himself a lifetime insurance contract which carries no restrictions as to residence, travel, or occupation. (FACTS FOR NAVY MEN-ABOUT NATIONAL LIFE INSURANCE, MAY, 1944)

460-98 AUTOMATIC INSURANCE FOR SERVICEMEN

460-98

The National Service Life Insurance Act provides insurance in the aggregate amount of \$5,000 for persons who die or become totally disabled in active service and in line of duty on or after October 8, 1940, and on or before April 19, 1942, without having applied for Government insurance in the aggregate amount of \$5,000. (RED CROSS ABRIDGED HANDBOOK OF HOME SERVICE INFORMATION.)

460-92 FEDERAL PENSIONS FOR SERVICEMEN OF WORLD WAR II

460-92

Pension is payable for disability or death due to injury or illness occurring in active service since the beginning of World War II (on or after December 7, 1941). Discharge from service must have been under honorable conditions and disability incurred "in line of duty" and not due to the claimant's own wilful misconduct. Rates for disability pension range from \$10 for 10 per cent disability to \$100 for total disability. There are also special rates for anatomical loss or loss of use of feet, hands, or eyes. Public Law 312 effective June 1, 1944, grants a 15% increase in pensions paid to veterans of World War II for disability. The 15% increase is also applicable to pensions awarded at war time rates for peacetime service performed under extra hazardous conditions on or after September 16, 1940. Statutory awards and special monthly pensions such as the special allowance for nurse or attendant care are not increased.

Widows, children, and dependent parents of persons who die in service or who die later as a result of disabilities incurred in line of duty may receive pension. Remarriage ends all further rights of a widow (but not those of her children). Children's pension stops at age eighteen except; (1) if they become permanently incapable of self-support before that age; (2) if the child is continuing an education in an approved school, in which case payments may continue to age twenty-one.

Monthly death pension rates are as follows: Widow, but no child, \$50; widow with one child, \$65, with \$13 for each additional child; no widow but one child, \$25; no widow but two children, \$30, (equally divided) with \$10 for each additional child (total amount equally divided). The total amount payable to a widow and children cannot exceed \$100. A dependent mother or father receives \$45, or if both are dependent, \$25 each. (ABRIDGED HANDBOOK OF HOME SERVICE INFORMATION, AMERICAN NATIONAL RED CROSS, REV. OCT. 1943; ADVANCE AND SUPPLEMENTAL HANDBOOK INFORMATION, LETTER NO. 175 (VOL. 11), JUNE 20, 1944)

460-95 NATIONAL SERVICE LIFE INSURANCE FOR SERVICEMEN

460-95

Members of the armed forces are given the privilege of applying for National Service Life Insurance. This is a system of life insurance offered by the Federal Government as a means of providing low-cost financial protection for families of servicemen and it is strictly a non-profit function of the government.

The serviceman may carry any amount of National Service Life Insurance from \$1,000 to \$10,000 in any multiple of \$500. The type of policy now offered is a 5-year Level Premium Term policy which gives complete financial protection to your beneficiary and maximum coverage at a minimum outlay.

(Section Continued on Next Page)

674-05 (Continued)

674-05

If the county wishes to have the SDSW make an independent finding in addition to the county's finding, request for such a finding shall be made in writing to the SDSW at Sacramento; the request shall be accompanied by a statement showing the claimant's contention, the amounts and periods involved, and the basis upon which the repayment was collected by the county. (W&IC 1560, 2140, 2222.7, 3075, 3460)

In cases where an erroneous repayment was made, the Federal, State and county shares of the erroneous repayment shall be returned.

Recipients of aid whose claim for the return of an erroneous repayment of aid has been rejected by the board of supervisors shall be informed of their right to appeal to the SSWB. (W&IC 1560, 2140, 3075, 3460)

674-10 FISCAL REPORTING OF RETURNS OF ERRONEOUS REPAYMENTS OAS, ANB, APSB, ANC

674-10

If the erroneous repayment was not previously reported to the SDSW on Forms Ag, Bl, CA 803 (Report of Adjustments) or Ag, Bl, CA 805 (Report of Collections), the return of the erroneous repayment need not be reported to the SDSW, but all pertinent facts surrounding the return shall be incorporated in the county case record.

If the erroneous repayment has already been reported to the SDSW on Forms Ag, Bl, CA 803 or 805, the county shall report the return of the erroneous repayment on a current claim as credit entries on Forms Ag, Bl, CA 803 or 805, and deduct them from the total of regular adjustments or collections reported. The fiscal distribution of the credit item shall be in the same relative proportion as the distribution of the original repayment. The date on which the return was made, together with the check or warrant number shall be reported on Forms Ag, Bl, CA 803 or 805. If the county has no regular adjustments or collections to report, or if such regular adjustments or collections total less than the returns to claimants, credit entries will appear under the appropriate items on the Aid Affidavit, Form Ag, Bl, CA 800.

In addition to inclusion on Forms Ag, Bl, CA 803 or 805, the return and all information pertaining thereto shall be reported to the SDSW for each individual case by means of a letter or Form Ag, Bl, CA 808 (Notice of Repayment). In the event Form Ag, Bl, CA 808 is used, the heading of the form should be changed to "Notice of Return of Repayment." (W&IC 1560, 2140, 2222.7, 3075, 3460)

673-50 REPORTING OF COLLECTIONS
OAS, ANB, APSB, ANC**673-50**

Collections are reported on the Aid Affidavits (Forms Ag, Bl, CA 800 and CA 800 BHI) under the items provided and detail is shown on Report of Collections (Forms Ag, Bl, CA 805), accompanying each respective claim. (SEE FORMS AG, BL, CA 800, CA 800 BHI AND AG, BL, CA 805 IN SEC. 629-99, COUNTY AID CLAIM FORMS.) (W&IC 116, 1560, 2140, 3075, 3460)

673-75 ADDITIONAL REPORTS OF ADJUSTMENTS AND COLLECTIONS
OAS, ANB, APSB, ANC**673-75**

Notices of Repayment (Forms Ag, Bl, CA 808), are used to report all repayments of aid. It shall be stated in the space provided on such forms whether the repayment is an adjustment or a collection. It is also necessary to include on these forms specific information regarding the reason for and the amount of the overpayment as well as the period during which the overpayment occurred; also the method used in computing the total amount of the distribution of the repayment. (SEE FORMS AG, BL, CA 808 IN SEC. 674-99, FORMS USED IN REPORTING REPAYMENTS.) (W&IC 116, 1560, 2140, 3075, 3460)

674-00 DEFINITION OF ERRONEOUS REPAYMENTS
OAS, ANB, APSB, ANC**674-00**

An erroneous repayment is a repayment of aid which has been collected upon the assumption that aid was extended to which the recipient was not in fact or by law entitled, and where it is later found that the recipient was in fact or by law entitled to the aid which he received. (W&IC 1560, 2140, 2222.7, 3075, 3460; AGO NS4608)

674-05 CLAIMS FOR THE RETURN OF ERRONEOUS REPAYMENTS
OAS, ANB, APSB, ANC**674-05**

Assistance shall be given by the County Welfare Department to individuals who wish to file claims for the return of erroneous repayments of aid. (W&IC 1560, 2140, 3075, 3460)

Claims for the return of erroneous repayments of aid shall be filed with the county auditor or the clerk of the board of supervisors within one year from the date on which the last item of the claim accrued; i.e., if the last erroneous payment on the same account occurred within one year preceding the date on which the claim is filed, all erroneous payments made on that account may be included in the claim.

Claims for the return of erroneous repayments, if duly filed, shall be approved by the board of supervisors if it is found that the repayment of aid was collected erroneously because of mistake of law or fact. In making findings with respect to erroneous repayments of aid, the county shall carefully determine if, during the period to which the repayment was applicable, there existed other factors of complete or partial ineligibility in addition to the one on which the repayment of aid was predicated; if such facts are found to have existed, it may be found that no return, or a return in a smaller amount, is in order. (AGO NS5407; POL C 4075)

A voluntary repayment of aid, made upon the initiative of the payer, without request or suggestion on the part of the county, constitutes a gift, and shall not be deemed to have been erroneous. (AGO NS1459)

(Section Continued on Next Page)

MAIN OFFICE
SACRAMENTO
616 K STREET
(14)

LOS ANGELES OFFICE
WASHINGTON BUILDING
311 SOUTH SPRING STREET
(13)

SAN FRANCISCO OFFICE
DAVID HEWES BUILDING
995 MARKET STREET
(3)

Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento
September 20, 1944

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

SOCIAL WELFARE BOARD
BEN KOENIG, CHAIRMAN
1680 NORTH VINE STREET
LOS ANGELES
MRS. MARY E. BARKWILL
ROUTE 1, BOX 55
LINDSAY
JOHN C. CUNEO
922 J STREET
MODESTO
WILFORD H. HOWARD
1815 REDWOOD HIGHWAY SOUTH
SANTA ROSA
GERALD C. KEPPLER
135 NORTH BRIGHT AVENUE
WHITTIER
JOHN T. MARTIN
1170 SEVENTH AVENUE
SAN DIEGO
MRS. JESSIE S. WILLIAMSON
2816 OAK KNOLL TERRACE
BERKELEY

IN REPLY PLEASE REFER
TO:

Dear Mr. Jordan:

Attached are three copies of regulations,
currently effective, made by the State Department
of Social Welfare.

These regulations are filed in accordance with
Article 21 of Chapter 3 of Title 1 of Part 3 of
the Political Code as amended by Chapter 628,
Statutes of 1941.

Very sincerely yours,

C. M. Wollenberg
CHARLES M. WOLLENBERG, Director *POK*
Department of Social Welfare

1944 SEP 21 AM 10 57
Encl.
b5

FILED
In the office of the Secretary of State
of the State of California
SEP 21 1944
FRANK M. JORDAN, Secretary of State
By _____ Dep.

MAIN OFFICE
SACRAMENTO
616 K STREET

EARL WARREN
GOVERNOR

STATE OF CALIFORNIA

LOS ANGELES OFFICE
WASHINGTON BUILDING
311 SOUTH SPRING STREET

DEPARTMENT OF SOCIAL WELFARE

SAN FRANCISCO OFFICE
DAVID HEWES BUILDING
995 MARKET STREET

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento

September 20, 1944

1297

FILED

In the office of the Secretary of State
of the State of California

SEP 21 1944

FRANK M. JORDAN, Secretary of State

By

MANUAL LETTER NO. 64

The attached material is to be entered in your copy of the Manual of Policies and Procedures as a portion of the AMOUNT OF GRANT chapter.

The sections present in manual form the existing policies and procedures, appearing in various bulletins, for determining the amount of the grant of aid in Aid to Needy Blind, Aid to Partially Self-Supporting Blind Residents, and Old Age Security. Section 155-25, relating to Old Age Security, presents one addition example (Example E) to demonstrate the preparation of the budget when there is income from real property.

Additional chapter sections for the Aid to Needy Children program are in preparation and will be released with forthcoming manual letters. The Reference Guide Separator attached is temporary and will be replaced when the chapter is complete.

These manual sections were approved by the Social Welfare Board on August 25, 1944.

Issuance of this material renders obsolete the following bulletins:

88B, 143 Revised A, 143 Revised A-Supplement, 143 Revised B, 144 Revised, 144 Revised A, 144 Revised B, 144 Revised B-Supplement, and 211A. All of Bulletin 211 is now obsolete except Page 17, paragraph 1, second sentence, beginning "If investigation reveals....."; page 26, Section III, Amount of Retroactive Aid Grants; page 27, Section VI, Applicant Not Eligible as of Beginning Date as Set Forth by Section 2183. All of Bulletin 216 is now obsolete except Page 5, Item VII, Applicant Not Eligible as of Beginning Date as Set Forth by Section 3082.

STATEMENTS CONTAINED IN THE MANUAL TAKE PRECEDENCE
OVER SAME MATERIAL PREVIOUSLY RELEASED IN BULLETINS

REFERENCE GUIDE TO AMOUNT OF GRANT CHAPTER

AID TO NEEDY BLIND

Amount of Grant in ANB, Method for Determining	156-15
Basic Needs in ANB, Definition of.	156-20
Need in Excess of Basic Continuing Needs in ANB, Method of Reporting	156-40
Need in Excess of Basic Continuing Needs in ANB, Procedure for Establishing.	156-30
Needs in Excess of Basic Continuing Needs in ANB, Definition and Determination of	156-25
Private Institutions, Determination of Amount of Grant in ANB of Inmates	156-60
Whole Dollar Amounts in ANB, Grant of Aid.	156-50
W&I Code, Provisions of Regarding Determination of Amount of Grant in ANB	156-05

AID TO PARTIALLY SELF-SUPPORTING BLIND

Amount of Grant in APSB, Method for Determining.	157-15
W&I Code, Provisions of Regarding Determination of Amount of Grant in APSB.	157-05

OLD AGE SECURITY

Amount of Grant in OAS, Method of Determining.	155-15
Budget Work Sheet (Ag 241) and Instructions For Use of	155-26
Need in Excess of \$50, Reporting to SDSW	155-60
Special Needs, Definition and Determination of	155-50
Statutory Maximum (\$50) Less Income.	155-20
Total Need-Determination by Budget	155-25
Total Need-Statutory Maximum (\$50) Plus Special Needs.	155-30
W&I Code, Provisions of Regarding Determination of Amount of Grant in OAS	155-05

REVISION RECORD

Revisions issued in changing this Chapter will be numbered in sequence. Changes made will be indicated by a vertical line in the margin of the corrected page, against the line or lines changed.

IT IS IMPORTANT that the holder of this Manual check the numbers below, corresponding with the numbers of the revisions when the latter have been incorporated in the Manual and the old pages removed, and that the State Department of Social Welfare be promptly notified in the event a number is passed without receipt of the corresponding numbered sheet.

1	11	21
2	12	22
3	13	23
4	14	24
5	15	25
6	16	26
7	17	27
8	18	28
9	19	29
10	20	30

155-15 (Continued)

155-15

There are two ways of establishing that the need is more than \$50.

1. The cost of special items of need may be added to the \$50 statutory maximum. (See Sec. 155-30, Total Need -- Statutory Maximum (\$50) Plus Special Needs.)

or

2. The amount required to meet the continuing basic needs of the individual together with the cost of any special items of need may be determined by computing a budget of the individual's requirements. (See Sec. 155-25, Total Need -- Determination by Budget.)

No monetary limit has been placed upon the extent that need may be in excess of \$50. (W&IC 2020.01, 2020.05, 2140; U. S. PUB L 45)

155-20 THE STATUTORY MAXIMUM (\$50) LESS INCOME OAS

155-20

The law establishes \$50 as the minimum need of the individual. When total need of the individual has not been established to be in excess of this amount, the income which must be considered in determining the grant shall be subtracted from \$50. (See Secs. 150-50, Types of Casual Income, and 151-95, Income from Agricultural Labor.) The amount of the grant so determined shall be such that when added to the income it equals exactly \$50. (W&IC 2020.01)

The advantages of making grants in whole dollars is recognized, and this is sometimes possible. However, income which is received in a specified known amount, i.e., fixed income, shall be deducted in its exact amount.

Example A: A recipient whose need does not exceed \$50 is receiving OASI in the amount of \$21.19 each month. This is his only income. The income is subtracted from \$50 and aid is granted in the amount of \$28.81 (\$50 minus \$21.19).

Certain other types of income may be adjusted to make the grant of aid in a whole dollar amount. The following types of income may be adjusted:

1. Regular income which is estimated, as in the case of value of a contribution in kind, such as free rent, free board and room, etc.

Example B: A daughter, in whose home an OAS recipient lives, contributes the recipient's share of the utilities. This is estimated to average about \$3.25 per month. This estimate may be reduced to \$3, resulting in a grant of \$47 (\$50 minus \$3).

(Section Continued on Next Page)

**155-05 PROVISIONS OF W. & I. CODE REGARDING DETERMINATION OF
AMOUNT OF GRANT IN OAS
OAS****155-05**

The amount of aid to which any applicant shall be entitled shall be, when added to the income (including the value of currently used resources, but excepting casual income and inconsequential resources) of the applicant from all other sources, fifty dollars (\$50) per month. When the actual need of an applicant exceeds fifty dollars (\$50) per month, such applicant shall be entitled to receive aid in an amount (not to exceed fifty dollars (\$50) per month) which when added to his income (including the value of currently used resources, but excepting casual income and inconsequential resources) from all other sources, shall equal his actual need. (W&IC 2020.01)

When amendments to the Federal statutes or rules and regulations of the FSSB permit, income or resources of the applicant shall not be deducted from the amount of aid to which the applicant would otherwise be entitled. (W&IC 2020.05)

Every person administering aid shall endeavor at all times to perform his duties in such manner as to secure for every aged person the maximum amount of aid to which he is entitled. (W&IC 2142.5)

**155-15 METHOD OF DETERMINING THE AMOUNT OF GRANT IN OAS
OAS****155-15**

The applicant or recipient who has no net income from any source shall be granted \$50 a month, the amount provided by law to meet the minimum need of the individual. Likewise a grant of \$50 a month shall be made when the only income received is:

Casual income. (See Secs. 150-40, Definition of Casual Income and Inconsequential Resources, 150-50, Types of Casual Income, and 150-60, Recording of Casual Income and Inconsequential Resources.)

or

Exempt agricultural income under the provisions of Sec. 151-95, Income from Agricultural Labor. (See Sec. 151-93, Definition of Agricultural Labor.)

If the applicant or recipient has income other than casual income or exempt agricultural income, the net income must be taken into consideration in determining the grant. The amount of net income shall be ascertained in accord with the Income Chapter.

The net income is subtracted from \$50 (see Sec. 155-20, Statutory Maximum (\$50) Less Income), the minimum need of the individual, unless the need is in excess of \$50, in which case the income is subtracted from that amount which represents the total need. In no case however may the grant exceed \$50.

(Section Continued on Next Page)

155-25 (Continued)

155-25

The amount of aid plus the income (other than casual income and exempt agricultural income) shall not exceed the total need except to the extent that the grant is adjusted to the next highest whole dollar.

Example: Total need as determined by the recipient's budget is \$63.80. He has OASI income of \$15.37 per month. The difference is \$48.43. Aid is granted in this amount or in the amount of \$49, the next higher whole dollar.

Any applicant or recipient who would benefit by having his net income deducted from his total need as established by a budget of his requirements may request that his grant be figured accordingly, and any necessary adjustment in the grant shall be made as soon as administratively possible. Responsibility rests upon the county to inform the recipient of the possible advantages accruing to him should he elect to have his income applied to total need as determined by his budget.

When figuring the total need of an individual according to his requirements, due regard shall be given to the Budget Schedule as adopted by the SSWB.

BUDGET SCHEDULE

The current Budget Schedule as adopted by the Social Welfare Board is as follows:

Food	\$18.85 (Increase 75% to \$33 if all meals are purchased in restaurants.)
Housing, as paid, for example	20.00
Utilities, as paid, or the following minima	
Electricity	1.20
Gas	2.35
Water	1.50
Garbage	.50
Other, for example, heat	1.80
Household operations	3.25
Clothing	5.00
Incidentals and personal needs	10.00
Transportation	3.00
Special Needs, such as medical care, etc., in the amount of actual cost. (See Sec. 155-50, Definition and Determination of Special Needs in OAS, for description of common special needs.)	
Total	<u>\$67.45</u>

(Section Continued on Next Page)

155-20 (Continued)

155-20

2. Irregular income of such a nature that consideration of the income received in the past is the only possible way of estimating the amount that the recipient might reasonably expect to receive in the future. That amount which represents the monthly average over the preceding three months' period reduced to the nearest whole dollar may be deducted in determining the grant.

Example C: A recipient regularly engages in the repairing of lawn mowers and his exact income from month to month can not be foretold. Income over the past three months has been as follows: June earnings, \$9.50; July earnings, \$12.75; August earnings, \$9.90; total earnings, \$32.15 or a monthly average of \$10.71. Therefore, \$10 is determined to be the recipient's average monthly income, and the grant is \$40 (\$50 minus \$10).

3. Income which represents both fixed and adjustable income.

Example D: A recipient whose need does not exceed \$50 is furnished free utilities by his daughter which are estimated at approximately \$4.35. In addition he receives OASI in the amount of \$21.85. The estimated income may be lowered to \$4.15 which, when added to the fixed income of \$21.85, adjusts the total income to \$26. Aid is then granted in the amount of \$24 (\$50 minus \$26).

When reporting income on the Certificate of Verification of Eligibility Form Ag 201, or on the Notice of Change (Form Ag 232), the adjusted amount of income that was used in determining the grant should be reported. (See Secs. 237-10, Instructions for Certificate of Eligibility, and 362-05, Instructions for Recording on Notice of Change, Section I.) (W&IC 2140)

155-25 TOTAL NEED - DETERMINATION BY BUDGET OAS

155-25

The individual's budget is one way of establishing total need when it is in excess of \$50 a month. (See Sec. 155-30, Total Need - Statutory Maximum (\$50) Plus Special Needs, for another way of determining that total need is in excess of \$50.) When a budget of the individual's requirements shows that his need is in excess of \$50 a month the grant is determined by subtracting the income, other than casual income and exempt agricultural income, from the total need as established by the budget, except that in no event may the grant exceed \$50. (See Secs. 150-50, Types of Casual Income, and 151-95, Income from Agricultural Labor.) When the difference is in partial dollars, aid may be granted in that amount which represents the next highest whole dollar.

(Section Continued on Next Page)

155-25 (Continued)

155-25

- (c) If the recipient lives in a home which he owns or in which he has an interest, the item of "Housing" is the sum of the costs of ownership and the net value of occupancy, if any, as determined under Sec. 152-10, Occupancy Value of Homes Owned By Recipients. In addition to the expenses of ownership which include taxes, insurance, assessments, and required encumbrance payments, an allowance of \$2 a month shall be made to cover the average cost of minor repair and upkeep. (The expense of occasional repair which is not met through the normal upkeep allowance and which is necessary to provide safe, healthful housing or to minimize deterioration, should be included as a separate special item of need. (See Sec. 155-50.)

When the recipient has an interest in the home with other persons, the value of occupancy plus his prorated share of the expenses of ownership represents his housing need, i.e., if the home is owned jointly with the wife, one-half of the expenses of ownership plus occupancy value, if any, is the housing need; if owned jointly by three persons, the recipient's housing need is one-third of the expenses of ownership plus the occupancy value, if any.

3. Utilities

Those utilities or services actually used by the individual represent his need. The amount allowed for the individual utility item may be as paid or the amount set forth on the Budget Schedule. If there is need for wood, coal, oil, garbage service, etc., the average cost of the particular item represents the need. When there are two or more members of the household, and the recipient reports that he pays only his prorated share, the amount as paid is the need.

4. Household Operations

This includes cleaning supplies, replacement of ordinary household supplies and equipment, etc., and the amount shown in the Budget Schedule represents the minimum need for every individual unless his living plan is such that he has no responsibility for providing these items as is the case of one who pays board and room. There may occasionally be special needs in connection with household operations, and when the minimum amount as shown in the Budget Schedule is inadequate, the need for special items may be included as a special need. (See Sec. 155-50.)

5. Clothing

This covers minimum need for purchase of new clothing and for clothing renovation. If the clothing needs of the individual require a greater amount than shown in the Budget Schedule, additional need, if established as provided in Sec. 155-50, may be included as a special item of need.

(Section Continued on Next Page)

155-25 (Continued)

155-25

The Budget Schedule is reviewed semi-annually, and revised when necessary. The schedule shall be used in each county. The amounts allowed for the various items for which a specific figure is set are based on an average of pricings throughout the State. They are mandatory unless different amounts have been determined on the basis of a pricing plan approved by the SDSW, except that the amounts for utilities may be those as paid, or the amounts set forth in the budget schedule. When the facts in the individual case establish that the need (not the want) of the recipient requires a larger amount than that shown in the Budget Schedule, the increased amount so determined may be included in the budget. (See "Explanation of Items of Need in Budget Schedule" in this section)

Only those items which represent the need of the individual recipient shall be included in his budget. For example, if the recipient has no expense for garbage removal, this item would be omitted from his budget. The Budget Schedule does not include a specific figure for special items of need. Any special items of need on the part of the individual would be included under "Special Needs" in his budget. These would fall largely in the category of special needs as set forth in Sec. 155-50, Definition and Determination of Special Needs in OAS. (W&IC 2021.01, 2140)

EXPLANATION OF ITEMS OF NEED IN BUDGET SCHEDULE:

1. Food

The smaller amount shown in the Budget Schedule represents the food allowance when the recipient has his meals at home, either alone or with a household group. The larger amount represents the food allowance when all meals are purchased in restaurants. If a physician has recommended a special diet and the cost is determined to be in excess of the amount allowed for food in the Budget Schedule, the excess is considered a "Special Need". (See Sec. 155-50, for information regarding special diets.)

When a recipient pays a stipulated amount for board, or pays for board and room, the amount of this item of need is the amount as paid.

2. Housing

A specific amount for the housing item is not set. Allowance is made on the basis of the recipient's living arrangement.

- (a) If the recipient pays rent, his housing need is the amount paid for rent. If two or more persons share the same quarters, the recipient's prorated share is his housing need.
- (b) If the recipient receives free rent, the estimated value of such free housing, as determined by the county, represents the amount of housing need. While due regard may be given to the actual value of such housing, the evaluation shall take into consideration the worth of the housing to one who has only limited funds available for his needs.

(Section Continued on Next Page)

155-25 (Continued)

155-25

Example B: A single recipient lives in his own home, assessed value \$800. Taxes average \$3 per month, and a street assessment, required payments on which average \$1.05 per month, represents the only encumbrance. Upkeep is \$2 per month. He has no special needs. He receives OASI in the amount of \$10 per month.

<u>Total Need</u>		<u>Income</u>	
Food	\$18.85	Net value of	
Housing		occupancy	\$ 2.95 (\$4 less \$1.05)
Taxes	3.00	OASI	<u>10.00</u>
Assessment	1.05		<u>\$12.95</u>
Upkeep	2.00		
Net value of occupancy	2.95	* * * *	
Electricity	1.20		
Gas	2.35	Total need	\$54.15
Water	1.50	Total income	<u>12.95</u>
Household operations	3.25	Budget	
Clothing	5.00	deficiency	\$41.20
Incidentals	10.00		
Transportation	<u>3.00</u>	Grant \$41.20 or \$42	
	\$54.15		

Example C: A couple, each receiving OAS, live in their own encumbered home assessed at \$1000. Taxes average \$6 a month, required monthly payments on the total encumbrance are \$12. Upkeep is \$2 a month. The couple state their monthly utility needs are, electricity \$2.60, gas \$3.50, water \$1.50. The husband receives \$20 a month veteran's pension. Necessary medical care for the wife costs \$5 a month. The budget for the husband is as follows:

<u>Total Need</u>		<u>Income</u>	
Food	\$18.85	Net value of occupancy	None
Housing		Veteran's pension after	
Taxes	\$ 6.00	allowing $\frac{1}{2}$ for wife	<u>\$10.00</u>
Encumbrance	12.00		<u>\$10.00</u>
Upkeep	<u>2.00</u>	* * * *	
$\frac{1}{2}$ of	\$20.00	Total need	\$53.90
Net value of occupancy*	None	Total income	<u>10.00</u>
Utilities**		Budget deficiency	<u>\$43.90</u>
Elec.	\$ 2.60		
Gas	3.50		
Water	<u>1.50</u>	Grant \$43.90 or \$44	
$\frac{1}{2}$ of	\$ 7.60		
Household operations	3.25		
Clothing	5.00		
Incidentals	10.00		
Transportation	<u>3.00</u>		
	\$53.90		

(Section Continued on Next Page)

155-25 (Continued)

155-25

6. Incidentals - Personal Needs

This item includes a wide variety of expenditures, as determined by the individual's personal habits and needs; for instance, hair cuts, toothbrushes and dentifrice, home medicine cabinet supplies, insurance, recreation, newspaper, community activities, etc. The amount shown in the Budget Schedule shall be included as the need of each recipient.

7. Transportation

This is for ordinary transportation needs. There may be occasions in which the actual need (not the want) of the recipient requires a greater amount, and when this is established the amount required is allowed.

There may be recipients who, because of their physical condition, have little use for transportation as such, but in lieu thereof require extra messenger and delivery service. In the rare case in which there is no need for transportation or for services in lieu thereof this item is omitted.

8. Special Needs

In addition to the items specifically set forth in the Budget Schedule, there may be other requirements of the individual such as those indicated in Sec. 155-50, i.e., medical care, dentures, etc. (W&IC 2140)

EXAMPLES OF DETERMINATION OF GRANT BY MEANS OF BUDGET SCHEDULE:

Example A: A single recipient living alone pays rent of \$20 a month. Rent includes water and garbage removal but does not include other utilities. In addition to gas for cooking, the recipient has to buy wood for heating at an average cost of \$1.80 a month. He has no special needs. His only income is a \$10 a month contribution from a son.

<u>Total Need</u>		<u>Income</u>	
Food	\$18.85	Contribution from son	\$10.00
Rent	20.00		
(including water)		* * * *	
Electricity	1.20		
Gas	2.35	Total need	\$65.45
Wood for heating	1.80	Total income	<u>10.00</u>
Household operations	3.25	Budget deficiency	\$55.45
Clothing	5.00		
Incidentals	10.00	Grant	\$50.00
Transportation	<u>3.00</u>		
	\$65.45		

(Section Continued on Next Page)

155-25 (Continued)

155-25

At the expiration of a four-month period, aid must be reduced as the need for dentures no longer exists. If other conditions remain the same, and the need for medical care continues, his total need according to the budget method will then be \$59.60 instead of \$74.60. The grant is adjusted as follows:

Total need	\$59.60
Total income	<u>29.00</u>
Budget deficiency	\$30.60

Grant \$30.60 or \$31

Example E: A couple, both recipients, live in a three-room rear cottage on property owned by them. There is a five-room house on the same lot which is rented for \$30 a month and the couple pay the water bill, \$1.50 per month. The total property is mortgaged, the required monthly payments being \$24, of which amount \$16 is interest and the balance is payment on the loan. The property is assessed at \$1800 and taxes average \$12 a month. The couple state their monthly utility needs are electricity, \$5.30 (used for lights and cooking). Their own water bill is \$1.50 a month. There are no special needs. Each spouse receives a \$10 contribution from a son. The budget for each spouse will be the same and is computed as follows:

<u>Total Need</u>		<u>Income</u>	
Food	\$18.85	Net value of occupancy	\$ 2.25
Housing*		Contribution from son	10.00
Net value of occupancy**	2.25	$\frac{1}{2}$ Net from rental***	<u>1.16</u>
Taxes	\$ 4.50		\$13.41
Encumbrance	9.00	Total need	\$53.50
Upkeep	<u>2.00</u>	Total income	<u>13.41</u>
$\frac{1}{2}$ of	\$15.50	Budget Deficiency	\$40.09
Utilities			
Electricity	5.30	Grant \$40.09 or \$41	
Water	<u>1.50</u>		
$\frac{1}{2}$ of	\$ 6.80		
Household operations	3.25		
Clothing	5.00		
Incidentals and personal needs	10.00		
Transportation	<u>3.00</u>		
	\$53.50		

*Since there are five rooms in the front house and three in the rear cottage the expenses of ownership on the property occupied is based on $\frac{3}{8}$ of the taxes, encumbrances, etc.

(Section Continued on Next Page)

155-25 (Continued)

155-25

*To arrive at net value of occupancy (see Sec. 152-10, Occupancy Value of Homes Owned by Recipients) deduct from the table value the recipient's share of the encumbrance payment. In this case the recipient's share of the encumbrance payment eliminates value of occupancy.

**The prorated share of utilities is allowed for each of the couple in computing his total need and each recipient fills in the affidavit at the bottom of the Budget Work Sheet (Form Ag 241) as to the amount of his share of the utilities for the household. (See Sec. 155-26, Form Ag 241, Budget Work Sheet, and Instructions for Use.)

The need of the wife is the same as that of her husband except that she has an additional need of \$5 per month for medical care. Therefore, her total need is \$53.90 plus \$5 or \$58.90, and her grant is determined as follows:

<u>Total Need</u>		<u>Income</u>
\$58.90	Net value of occupancy	None
	$\frac{1}{2}$ of Veteran's pension	
	received by husband	\$10.00
	* * * *	
	Total need	\$58.90
	Total income	<u>10.00</u>
	Budget deficiency	\$48.90
	Grant \$48.90 or \$49.00	

Example D: A single recipient earns \$15.00 and in addition receives free rent and utilities in a rear cottage owned by a sister. The county has determined the value of free rent and utilities to be \$14 a month. There is no other income. The recipient has need for dentures and has made arrangements to purchase them, paying \$15 a month for four months. He also requires regular medical care which costs \$5.50 a month.

<u>Total Need</u>		<u>Income</u>
Food	\$18.85	Value of free rent and
Rent and Utilities	14.00	utilities
Household operations	3.25	Earnings
Clothing	5.00	Total income
Incidentals	10.00	* * * *
Transportation	3.00	Total need
Dentures	15.00	Total income
Medical Care	<u>5.50</u>	Budget deficiency
	\$74.60	\$45.60
	Grant \$45.60 or \$46	

(Section Continued on Next Page)

155-26 (Continued)

155-26

1. Food (Leave blank if board and room is paid.)

From the Budget Schedule enter the amount for food in accord with the recipient's living plan, i.e., the smaller amount if living alone or as a member of a household group, and the larger amount if eating all meals in restaurants. No verification of the amount is required and no entry is necessary in the "How Verified" column. If the recipient takes his meals on a board basis, or pays for board and room, enter the amount as paid. Verification shall be made, either through receipts in the recipient's possession, by his personal affidavit, or otherwise, and the method used is indicated in the "How Verified" column.

If the recipient pays board and room, leave the "Food" item blank, and also leave blank all other items above Item 5, "Board and Room." (See instructions for Item 5.)

2. Housing (Leave blank if board and room is paid.)

If the recipient lives in other than his own property, enter the rental paid or his prorated share if two or more persons share the same quarters. The amount shall be verified, either through receipts or the recipient's personal affidavit or otherwise, and the method of verification entered in the "How Verified" column.

If free rent is contributed by another, enter the estimated value as determined by the county. Enter "worker's evaluation" or some other appropriate statement in the "How Verified" column.

If the recipient lives in a home which he alone owns, complete the appropriate items for costs of ownership, including a \$2 allowance for upkeep. If there is a net value of occupancy under the provisions of Sec. 152-10, Net Income from Real Property, enter this amount also. If there is no net value of occupancy, enter "none" for this item. Record the total expenses of ownership and net occupancy value, if any.

When the recipient has an interest in the home with other persons, his prorated share of the expenses of ownership shall be shown, i.e., if home owned with wife, one-half of the expenses of ownership is entered; if owned jointly by three persons, one-third of the expenses of ownership is entered. (The value of occupancy, if any, is based on the total assessed value of the home.)

In the "How Verified" column, indicate the method by which taxes, encumbrances, etc., were verified, i.e., tax receipts, mortgage books, etc.

3. Utilities (Leave blank if board and room is paid.)

Enter the average amount as paid for the particular utility, or the amount shown in the Budget Schedule, in the appropriate space. When there is no need for the particular utility enter "none". If an amount is

(Section Continued on Next Page)

155-25 (Continued)

155-25

**Value of occupancy of rear cottage is based on $\frac{3}{8}$ of the total assessed value of the whole property (Sec. 152-10) less each spouse's share of $\frac{3}{8}$ of the required encumbrance payment.

***From the \$30 rental deduct $\frac{5}{8}$ of the taxes, $\frac{5}{8}$ of the interest (no deduction for principal payment), upkeep (determined according to formula, see Sec. 152-10), and the water bills which the couple pay for that property. Since the income property is community property, each spouse has one-half of the net income.

Example F: A recipient in feeble physical condition pays \$45 per month board and room in a rest home, where all services are provided. He is unable to leave the house, and has no need of transportation. He has income of \$21 per month from OASI benefits.

Total Need

Board and room	\$45.00	OASI	\$21.00
Clothing	5.00		
Incidentals	<u>10.00</u>	* * * * *	
	\$60.00	Total need	\$60.00
		Total income	<u>21.00</u>
		Budget deficiency	\$39.00

Grant \$39

155-26 FORM AG 241, BUDGET WORK SHEET, AND INSTRUCTIONS FOR USE
OAS

155-26

In all cases in which the amount of the grant is determined on the basis of total need as established by the budget method, the case record shall include Budget Work Sheet (Form Ag 241), on which shall be recorded the full detail of the budget, the source and amount of income to be applied toward total need, and the verifications. Casual income and exempt agricultural income are not considered in determining the grant of aid and shall not be entered on Form Ag 241. (See Sec. 150-60, Recording of Casual Income and Inconsequential Resources.)

GENERAL INSTRUCTIONS:

The budget work sheet will ordinarily be completed in long hand and shall be retained in the county record. Complete the identifying data in the upper right hand corner, and indicate if the recipient is living as a member of a household. If so, enter the number of individuals in the household.

ITEMS OF NEED AND HOW VERIFIED:

See Sec. 155-25, Total Need -- Determination by Budget, for the Budget Schedule and explanation of the various items in the budget.

(Section Continued on Next Page)

155-26 (Continued)

155-26

If the amount shown in the Budget Schedule is insufficient to cover necessary transportation costs, the amount actually needed is shown and the "How Verified" column must show how the need was determined.

9. Special Needs

Specify the particular need and show the amount for each need. In this space is entered only those needs which are in addition to the need items specifically set forth in the Budget Schedule. Verification must be made in accord with provisions of Sec. 155-50, Definition and Determination of Special Needs in OAS, and be recorded in the "How Verified" column, together with a statement of the probable period over which the need will continue.

10. Total Need

Enter the sum of the individual items of need.

INCOME ITEMS AND HOW VERIFIED:

Specify on Budget Work Sheet (Form Ag 241) each source from which income (other than casual income and inconsequential resources, and exempt agricultural income) is received, including the net value of occupancy, if any, and the amount received from each source. In the "How Verified" column state the method of verification. Record the total amount of net income. (See Income Chapter)

SUMMARY:

Total Need. Enter the total need which is the amount recorded opposite Item 10 in the "Need" section of the form.

Total Income. Enter the total income received from all sources as recorded in the section immediately above the "Summary" section of the form.

Difference Between Need and Income. Enter that amount which is the result of subtracting the total income from the total need.

Amount of Aid Recommended. Enter the amount of aid recommended. If the difference between total need and total income is in partial dollars, the grant may be made in that figure which represents the next highest whole dollar.

Remarks. For comment as the worker may desire.

Budget Computed By. The signature of the worker computing the budget and the date are to be shown here.

AFFIDAVIT OF RECIPIENT:

When the amount of need for board or board and room, for rent, or for utilities, is verified by the recipient's statement of his expenditures for one or more of these items, his affidavit is required and may be secured in this space. This space is otherwise left blank. (W&IC 2140)

155-26 (Continued)

155-26

allowed for a utility or service other than as listed, specify opposite "other". When amounts as shown in the Budget Schedule are used for the utility items, no entry is necessary in the "How Verified" column. If the "as paid" amount is entered, verification shall be made, either through receipts in the applicant's possession, by his personal affidavit, or otherwise and the method used is indicated in the "How Verified" column.

4. Household Operations (Leave blank if board and room is paid.)

Enter the amount shown in the Budget Schedule. When household furniture or equipment is inadequate or substandard to a point where the expense of securing necessary items is in excess of the cost of ordinary household operations, the cost of necessary replacement or of augmenting the present supply should be included under Item 9 of Form Ag 241.

5. Board and Room

Enter the amount as paid. Verification is necessary, either through receipts in possession of the recipient or by his personal affidavit, or otherwise. In the "How Verified" column state how the amount was verified.

(Items of need above Item 5 do not apply to persons living on a board and room basis.)

6. Clothing

Enter the amount shown in the Budget Schedule. No entry is required in the "How Verified" column. Should an additional amount be needed for clothing, this special need should be included under Item 9, and the method of verification of the need for the additional allowance for clothing is stated in the "How Verified" column.

7. Incidentals

Enter the amount shown in the Budget Schedule. No statement is required in the "How Verified" column.

8. Transportation

Enter the amount as shown in the Budget Schedule unless the facts definitely establish that the recipient has no need for transportation and does not have other expenses in lieu of it, such as expenses for delivery or messenger service, etc. No entry is necessary in the "How Verified" column unless the transportation item is omitted, in which case give the reason either in that column or under "Remarks".

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FORM AG 241, September, 1942
STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE

BUDGET WORK SHEET OLD AGE SECURITY

Case Name Sarah Blank
State No. 3279 County No. San 2001 ag
Living as a member of household group ☒ Yes ☐ No
If yes, number in household 2

Complete only those items which represent need of the individual recipient. If the recipient pays board and room leave blank all items above Number 5 on this form.

NEED			INCOME (Do not include casual income or value of inconsequential resources)		
ITEM OF NEED	AMOUNT	HOW VERIFIED	SOURCE	AMOUNT	HOW VERIFIED
1. Food	18.85		Net Value of Occupancy, If Any		
2. Housing			<u>Low</u>	10.00	<u>ag 225</u>
(a) Rent			<u>OASI</u>	11.50	<u>OASI award letter</u>
Taxes	6.00	<u>Tax receipt</u>			
Assessments		<u>mortgage book</u>			
Encumbrance	12.00				
Upkeep	2.00				
(b) Own Home					
Net value of occupancy* (if any)	-				
TOTAL <u>12 of 20.00</u>	10.00		Total Income	21.50	
Gas	3.50	<u>affidavit</u>			
Electricity	2.60				
Water	1.50				
Other	-				
TOTAL <u>12 of 7.60</u>	3.80				
3. Utilities					
4. Household Operations	3.25				
5. Board and Room	-				
6. Clothing	5.00				
7. Incidentals	10.00				
8. Transportation	3.00				
9. Other Needs (Specify)					
<u>Dentures</u>	15.00	<u>Broke old plate. Dentist signed statement that cost is \$60. and to pay \$15. a month. Need will continue 4 months.</u>			
10. Total Need	\$68.90				

SUMMARY	
Total Need	68.90
Total Income	21.50
Difference Between Need and Income	47.40
Amount of Aid Recommended	\$48.00

REMARKS:

Budget Computed by Mary Roe Date 8-11-44

* If there is a net value of occupancy, always enter the identical amount shown here in the income section.

AFFIDAVIT OF RECIPIENT OF OLD AGE SECURITY

This Is To CERTIFY, That I, Sarah Blank, pay \$_____ per month for rent; \$_____ per month for board or \$_____ per month for board and room; and that the average monthly cost of my utilities is \$ 3.80.
Subscribed and sworn to before me this 5 day of Aug 19 44
Name Mary Roe TITLE Deputy County Clerk
SIGNATURE OF PERSON AUTHORIZED TO ACKNOWLEDGE AN AFFIDAVIT

Sarah Blank
SIGNATURE OF AFFIANT

FORM AG 241

155-30 (Continued)

155-30

EXAMPLES OF DETERMINATION OF TOTAL NEED:

Example B: A single recipient earns \$17 a month. He has no other income. The recipient has need for dentures and has made arrangements to purchase them, paying \$15 a month for four months.

<u>Need</u>		<u>Income</u>	
Basic Needs	\$50.00	Earnings	\$17.00
Dentures	<u>15.00</u>		
	\$65.00		

* * * * *

Total need	\$65.00
Total income	<u>17.00</u>
Grant	\$48.00

At the end of a four-month period the need for dentures no longer exists. If other conditions remain the same the need is no longer in excess of \$50. The income is then subtracted from \$50, and the grant adjusted to \$33.

Example C: A couple, both recipients, live in their own home, \$800 assessed value. The husband has regular part-time employment and earns \$22 each month. The wife's need for insulin has been established by her physician. It costs approximately \$7 a month and the need is expected to continue indefinitely. The house leaks and requires extensive roof repair. A plan has been agreed upon between the contractor and the recipients whereby the roof will be repaired for \$80 and the recipients will pay the contractor a total of \$8 a month for ten months. The grant for the husband is computed as follows:

<u>Need</u>		<u>Income</u>	
Basic Continuing Needs	\$50	Value of occupancy	\$ 4
Roof Repair		$\frac{1}{2}$ of the Earnings	<u>11</u>
($\frac{1}{2}$ of monthly payment)	<u>4</u>	Total Income	\$15
Total Need	\$54		

* * * * *

Total need	\$54.00
Total income	<u>15.00</u>
Grant	\$39.00

(Section Continued on Next Page)

**155-30 TOTAL NEED - STATUTORY MAXIMUM (\$50) PLUS SPECIAL NEEDS
OAS****155-30**

Since the law provides that the income of the recipient together with the amount of the grant shall equal at least \$50, it is the presumption that \$50 covers the basic continuing needs common to all recipients. (Should the recipient elect to have his need determined on the basis of his budget the presumption that \$50 is adequate to meet his basic continuing needs may be refuted. See Sec. 155-25, Total Need - Determination by Budget.)

The basic continuing needs common to all recipients and which are presumed to be met on \$50 a month, the minimum amount which the law guarantees to every eligible individual, are:

1. Food -- The normal amount and kind of food needed by the average aged adult to maintain health and vigor.
2. Housing -- Adequate, suitable, sanitary housing, in the locality chosen by the applicant or recipient.
3. Utilities -- Lights, water, and fuel needed to maintain health and comfort.
4. Clothing -- Adequate, healthful clothing.
5. Household Replacements -- The occasional replacement of normal household equipment and/or supplies.
6. Transportation and Communication -- Carfare, gasoline for automobile, telephone, stamps, etc.
7. Incidentals -- The usual expenditures for haircuts, recreation, including expenses necessary to maintain normal social contacts, etc.

In addition to the basic continuing needs common to all, the individual may have additional requirements, i.e., special needs arising out of impaired health, a particular handicap, etc. (See Sec. 155-50, Definition and Determination of Special Needs in OAS.)

When a recipient has special needs in addition to basic continuing needs, the amount of total need may be established by adding the cost of special items of need to \$50. (See Sec. 155-25, for another way of establishing the total need of one whose requirements are such that they cannot be met on \$50 a month.) The amount of the grant is then determined by subtracting the income from that figure which represents the total need, except that in no event may the grant exceed \$50. When this difference is in partial dollars, aid may be granted in that amount which represents the next highest whole dollar.

The amount of aid plus the income of the individual shall not exceed the total need except to the extent that the grant is adjusted to the next highest whole dollar. (W&IC 2020.01, 2140)

Example A: Total need is determined to be \$58.98. The recipient has OASI income of \$14.61 per month. The difference is \$44.37. Aid is granted in this amount or \$45, the next highest whole dollar.

(Section Continued on Next Page)

155-50 (Continued)

155-50

2. Sanatorium or Rest Home Care:

The type of care required should be designated by the physician in charge of the case, or in the unusual case in which there is no attending physician, by the county worker, and the cost of such care should not exceed the average cost for that type of care in a given community.

3. Prescriptions:

- (a) Medical Prescriptions: (When not available to the recipient without cost through public facilities.)

It is assumed that only physicians and dentists may prescribe "medical prescriptions". Verification by a pharmacist of expenditures for drugs does not establish the need for such expenditures. Need for proprietary drugs if verified by the written statement of a physician, represents need in excess of basic continuing needs.

- (b) Eyeglass Prescriptions:

When ordered by a physician, optician, or an optometrist.

4. Special Diets:

On the written recommendation of a physician and in the amount that the special diet exceeds the cost of the normal diet, need in excess of basic continuing needs may be established.

5. Occasional Repairs of Homes Owned and Occupied by Recipients:

If necessary to provide safe and healthful housing, or to minimize deterioration, the expense of occasional repairs may be considered special need during the period in which the cost of such repairs is being paid.

The plan for payment agreed upon between the contractor or vendor and the recipient should be recorded in detail.

6. Replacement of Worn-Out Household Equipment and/or Supplies, Clothing, Etc.:

Household furniture, equipment, and/or clothing may be inadequate or substandard to a point where the expense of securing necessary items is in excess of ordinary upkeep. This may be the situation of persons whose income, prior to receipt of aid, was insufficient to meet normal requirements. It also may result from a change in living plan. When such is the case, the cost of necessary replacement, or of augmenting the present supply may be established as special need.

(Section Continued on Next Page)

155-30 (Continued)

155-30

The grant for the wife is computed as follows:

<u>Need</u>		<u>Income</u>	
Basic Needs	\$50	Value of Occupancy	\$ 4
Insulin	7	$\frac{1}{2}$ of Husband's	
Roof Repair		earnings	<u>11</u>
($\frac{1}{2}$ of monthly payment)	<u>4</u>	Total Income	<u>\$15</u>
Total Need	<u>\$61</u>		

* * * * *

Total Need	\$61.00
Total Income	<u>15.00</u>
Grant	<u>\$46.00</u>

At the end of the ten-month period the need for roof repair will have been allowed in full. If the conditions remain the same the man's grant should be reduced to \$35 (\$50 minus \$15) and the woman's grant shall be reduced to \$42 (\$57 minus \$15). (See Sec. 155-60, Reporting Need in Excess of \$50 to SDSW.)

155-50 DEFINITION AND DETERMINATION OF SPECIAL NEEDS IN OAS OAS

155-50

In addition to basic continuing needs as discussed in Sec. 155-30, Total Need -- Statutory Maximum (\$50) Plus Special Needs, the individual may have other needs. Additional requirements or "special needs" may exist due to the impaired health and/or activity of the recipient, physical handicap, housing conditions, etc. Special needs shall be determined on the basis of the individual's circumstances, and in such amount as required to cover factual and realistic needs of the individual and not a family group. The liquidation of unsecured debts incurred in the past does not represent a current need.

The special needs which are most often found to be in excess of basic continuing needs of the individual recipient include:

1. Medical Care:

In general, when professional service for medical care is available without cost to recipients through public facilities or otherwise, need in excess of basic continuing needs for medical care may not be established. Availability is also interpreted as accessibility of such professional service, i.e., should the recipient be deterred by distance or physical handicap from availing himself of professional service without cost, it is not considered that such service is in fact available to that particular recipient.

(Section Continued on Next Page)

155-50 (Continued)

155-50

The foregoing special needs are not intended to be all inclusive. There are undoubtedly other needs of some recipients which are not listed and which may constitute a special need. Conversely, the fact that a need has been listed as a possible requirement does not imply that every expenditure for such an item represents an actual need.

PROCEDURE IN ESTABLISHING SPECIAL NEEDS IN EXCESS OF BASIC CONTINUING NEEDS:

When considering items of special need in excess of basic continuing needs distinction must be made between a "want" and a "need".

The term "physician", when used in connection with the establishment and/or verification of need in excess of the basic grant for such items as Medical Care, Sanatorium and Rest Home Care, Medical Prescriptions or Special Diets, relates to a doctor who is licensed as a physician and surgeon under Chapter 5 of Division II of the Business and Professions Code. (This relates to physicians possessing M.D. degrees, and those possessing D.O. Degrees who have a physician's and surgeon's certificate.)

The need for household repairs, and household replacements can best be evaluated by the worker in terms of the recipient's surroundings, household equipment, etc. The worker's determination of the need for other items for which no specific method of determination is indicated is adequate. In every case the record must show the verification secured and/or the facts or circumstances upon which the worker determined the need for the particular item established as a special need. The probable period over which the need will continue shall also be recorded.

(Section Continued on Next Page)

155-50 (Continued)

155-50

Replacement of household equipment and supplies, clothing, etc., destroyed in a catastrophe such as fire, flood, etc., may be considered need in excess of basic continuing needs to the extent that such possessions have not been covered by insurance.

7. Housekeeping Service:

The cost of housekeeping service or its equivalent in housekeeping equipment may be established as need in excess of basic continuing needs when the physical condition of the recipient is such that the service is required for the well being of the individual recipient.

8. Nursing Service:

The need for nursing service should be designated by the physician in charge of the case, or in the unusual case in which there is no attending physician, by the county worker and the cost of such care should not exceed the average cost of that type of care in a given community.

Such services if performed without cost by neighbors, relatives or friends shall not be considered on a commercial basis and therefore no monetary value shall be placed thereon. No allowance may be made in the grant to provide for the payment by the recipient to responsible relatives for such services.

9. Excess Heat:

The cost of extra heat needed because of ill health or impaired vitality represents excess need in the amount of the additional cost.

10. Occasional or Unusual Needs:

The occasional or unusual needs which may be due to accident or ill health, or which may be necessary to preserve health and normal activity is excess need and such need may be established by the worker. Among these needs are:

- (a) Dentures or dental work.
- (b) Hearing aids.
- (c) Trusses or orthopedic appliances, wheel chairs, crutches, etc.
- (d) Dressings and other sick room supplies.
- (e) Special housing. When physical handicaps require special housing which can be secured only through a disproportionate expenditure, such as one-half or more of the statutory grant, that amount by which the cost of such housing exceeds normal rental may be established as special need.

(Section Continued on Next Page)

**155-60 REPORTING NEED IN EXCESS OF \$50 TO SDSW
JAS****155-60****APPLICATIONS:**

When the grant for an applicant is determined by subtracting the income from total need which is in excess of \$50 a month, that fact shall be reported on the Certificate of Verification of Eligibility (Form Ag 201). See Sec. 237-10, Instructions for Certificate of Eligibility, Item 12, which specifies the information to be reported when total need has been established by the individual's budget (see Sec. 155-25, Total Need - Determination by Budget) and when total need has been determined by adding the cost of special needs to \$50. (See Sec. 155-30, Total Need - Statutory Maximum (\$50) Plus Special Needs.)

CURRENT CASES AND RESTORATIONS:

When the grant is determined by the individual's budget (see Sec. 155-25, Total Need - Determination by Budget) that fact shall be reported in the usual manner by submission of a Notice of Change (Form Ag 232). (See Sec. 362-05, Instructions for Recording on Notice of Change, Section I.) The amount of total need is entered in Column 6, and in Column 7 the notation "Form Ag 241 on file" is entered. (The verification of those items of need for which verification is required, and the verification of the income, shall be included in the case record, usually on Form Ag 241, Budget Work Sheet.)

When the grant is determined by subtracting the income from total need as established by adding the cost of special items of need to \$50 (see Sec. 155-30, Total Need - Statutory Maximum (\$50) Plus Special Needs) that fact shall be reported in the usual manner by submission of a Notice of Change (Form Ag 232). The amount of total need is entered in Column 6, and in Column 7 a statement shall be made of the particular special needs, the cost of each, and how the need and the cost were verified. (See Sec. 362-05.)

See Sec. 362-25, Change in Need or Income No Change in Grant, for reporting requirements as the need and/or income change, and the basis on which the grant is determined changes. (W&IC 2140)

155-50 (Continued)

155-50

Income shall not be designated to provide for specific items of need. The total income for any given period must be applied toward the total need for that period, and need in excess of basic continuing needs may be allowed only during the period that such need actually exists. However, since income received in the current month and the two preceding months is considered current income, an excess need that occurred in the two preceding months may be considered current need to the extent that the total need for that period remains unmet at the time of the adjustment. For example, in August a recipient of OAS needed medical attention -- total cost \$18. This became known to the county in September and it was verified that such private medical attention was needed. However, the recipient managed to pay \$8 of this bill without incurring other debts so that only \$10 could be considered current excess need in adjusting the October grant.

In the case of fluctuating income, or income received quarterly, semi-annually or annually, a plan of payment for needs in excess of continuing basic needs may be a promise to pay at the time and in the amount that income is received. For example, a recipient of OAS has an income of \$120 from an annuity payable on January 1 of each year. On July 1, of the current year, need in excess of basic continuing need was established and verified for continuing medical care in the amount of \$10 a month. The recipient made arrangements with the physician to furnish medical care on credit, to be paid for when the annual income is received next January.

Payments made in advance for anticipated future medical care can not be considered as need in excess of basic continuing need. (W&IC 2020.01, 2140)

156-15 (Continued)

156-15

difference between the actual need and the income of the recipient, if any, but in no case shall the grant of aid exceed \$50 a month. Income and the value of the use of resources shall be taken into consideration as income except casual income and inconsequential resources. (See Secs. 150-40, Definition of Casual Income and Inconsequential Resources, 150-50, Types of Casual Income, and 151-00, Definition of Income; also other pertinent sections of Income Chapter.)

Example:

<u>Total Need</u>		<u>Income</u>	
Basic continuing need	\$50.00	OASI benefits	\$40.00
Eye glasses (per month)	5.00	ANB grant	<u>19.00</u>
Special diet prescribed by physician	<u>4.00</u>		59.00
Total Need	\$59.00		

The statutory maximum grant of \$50 a month is considered to provide for the basic need of blind persons. Basic need includes food, housing, utilities, usual items of clothing, household replacements, transportation and communication, and incidentals of a minor nature. (See Sec. 156-20, Definition of Basic Needs in ANB, for a more detailed description of these basic needs.)

Other common needs of blind persons are considered as need in excess of basic need and these are determined with reference to the health, comfort, and well-being of the blind persons. Such needs usually fall within one of the following categories: medical care, sanatorium or rest home care, prescriptions, special diets, repairs of homes, replacement of household equipment, supplies and clothing, housekeeping service, nursing service, excess heat, occasional unusual needs and special needs incident to blindness. (See Sec. 156-25, Definition and Determination of Needs in Excess of Basic Continuing Needs in ANB for a more detailed description.) (W&IC 3075, 3084)

When the circumstances of the individual are such that there are no needs in excess of the basic needs, the grant of aid is computed by deducting income and the value of the use of resources (except casual income and inconsequential resources) from the maximum statutory grant of \$50 a month. (See Sec. 151-20, Definition of Resource.) (W&IC 3075, 3084)

**156-05 PROVISIONS OF W. & I. CODE REGARDING DETERMINATION OF AMOUNT
OF GRANT IN ANB
ANB****156-05**

The amount of aid to which any applicant shall be entitled shall be, when added to the income (including the value of currently used resources, but excepting casual income and inconsequential resources) of the applicant from all other sources, fifty dollars (\$50) per month. When the actual need of an applicant exceeds fifty dollars (\$50) per month, such applicant shall be entitled to receive aid in an amount (not to exceed fifty dollars (\$50) per month) which when added to his income (including the value of currently used resources, but excepting casual income and inconsequential resources) from all other sources, shall equal his actual need. (W&IC 3084)

Free board and lodging supplied to an applicant for ANB because of his necessity therefor, by a friend or relative who is not responsible for his support or who is financially unable to support him, shall not be a ground for refusing aid. (W&IC 3049)

The county board of supervisors shall investigate, annually or oftener, the qualifications of the blind persons receiving aid under the provisions of this chapter and may increase or decrease the allowance within the limits prescribed in this chapter, or, if the board is satisfied that any person receiving such aid is not entitled thereto, it shall deny him further aid and shall forthwith notify the county auditor and the Chief of the Division for the Blind in the SDSW of such action. The person receiving aid, however, shall have the right of appeal to the SSWB from such action. (W&IC 3089)

**156-15 METHOD FOR DETERMINING THE AMOUNT OF GRANT IN ANB
ANB****156-15**

The law recognizes that the total need of the individual blind recipient may actually be in excess of the maximum statutory grant of \$50 a month. (See Sec. 156-25, Definition and Determination of Needs in Excess of Basic Continuing Needs in ANB.) When the circumstances of the individual are such that need in excess of \$50 a month exists, the cost of such need shall be considered in addition to the cost of basic needs to determine the total need. (See Sec. 156-20, Definition of Basic Needs in ANB.) The grant of aid in such a case shall be the

(Section Continued on Next Page)

156-25 DEFINITION AND DETERMINATION OF NEEDS IN EXCESS OF BASIC CONTINUING NEEDS IN ANB**156-25**

The ANB law recognizes that the minimum need of an individual ANB recipient is \$50 a month. (See Sec. 156-20, Definition of Basic Needs in ANB.) The amount of aid granted plus the income received must equal at least the statutory maximum of \$50 a month to cover the basic continuing need of such recipient.

There are many special needs which are often incident to blindness or unusual circumstances and which may be necessary to effect those physical, social or economic adjustments required to promote the well-being of the individual blind person. These special needs may be in excess of the basic continuing needs. (See Sec. 156-20, Definition of Basic Needs in ANB.) No monetary limit has been placed upon the extent of the need in excess of the basic continuing needs.

NEEDS IN EXCESS OF BASIC CONTINUING NEEDS

Needs in excess of the basic continuing needs shall be determined on the basis of the individual recipient's circumstances, and to the extent that is required to cover factual and realistic needs. These needs must be determined with reference to the health, comfort, and well-being of the individual recipient.

The needs which are most usually found to be in excess of basic continuing needs of the individual recipient include:

1. Medical Care:

In general, when professional service for medical care is available without cost to recipients through public facilities or otherwise, need in excess of basic continuing needs for medical care may not be established. Availability is also interpreted as accessibility of such professional service, i.e., should the recipient be deterred by distance or physical handicap from availing himself of professional service without cost, it is not considered that such service is in fact available to that particular recipient.

2. Sanatorium or Rest Home Care:

The type of care required should be designated by the physician in charge of the case, or in the unusual case in which there is no attending physician, by the county worker, and the cost of such care should not exceed the average cost for that type of care in a given community.

3. Prescriptions:

- (a) Medical Prescriptions: (When not available to the recipient without cost through public facilities).

(Section Continued on Next Page)

156-20 DEFINITION OF BASIC NEEDS IN ANB
ANB

156-20

The basic needs expected to be covered by the statutory maximum grant of \$50 a month are:

1. Food -- The normal amount and kind of food needed by the average person to maintain health and vigor.
2. Housing -- Adequate, suitable, sanitary housing, in the locality chosen by the applicant or recipient.
3. Utilities -- Lights, water, and fuel needed to maintain health and comfort.
4. Clothing -- Adequate, healthful clothing.
5. Household Replacements -- The occasional replacement of normal household equipment and/or supplies.
6. Transportation and Communication -- Carfare, gasoline for automobile, stamps, etc.
7. Incidentals -- The usual expenditures for haircuts, recreation, including expenses necessary to maintain normal social contacts, etc.
(W&IC 3075, 3084)

156-25 (Continued)

156-25

exceeds the current cost of food. Experience would seem to indicate that a maximum allowance of \$15.00 a month would be a reasonable estimate of the amount by which restaurant meals would normally exceed the current cost of food.

8. Nursing Service:

The need for nursing service should be designated by the physician in charge of the case, or in the unusual case in which there is no attending physician, by the county worker and the cost of such care should not exceed the average cost of that type of care in a given community.

Such services if performed without cost by neighbors, relatives or friends shall not be considered on a commercial basis and therefore no monetary value shall be placed thereon. No allowance may be made in the grant to provide for the payment by the recipient to responsible relatives for such services.

9. Excess Heat:

The cost of extra heat needed because of ill health or impaired vitality represents excess need in the amount of the additional cost.

10. Occasional Unusual Needs:

The occasional or unusual needs which may be due to accident or ill health, or which may be necessary to preserve health and normal activity is excess need and such need may be established by the worker. Among these needs are:

- (a) Dentures and dental work.
- (b) Hearing aids.
- (c) Trusses or orthopedic appliances, wheel chairs, crutches, etc.
- (d) Dressings and other sick room supplies.
- (e) Special housing. When physical handicaps require special housing which can be secured only through a disproportionate expenditure, such as one-half or more of the statutory grant, that amount by which the cost of such housing exceeds normal rental may be established as excess need.

11. Special Needs:

The following additional items may be necessary to effect physical, social or economic adjustment of the blind recipient in which event they may be established as needs in excess of basic continuing needs:

- (a) Personal services, such as a personal guide, reader, etc.
- (b) Guide dog, and/or maintenance therefor. The recipient's estimate of the cost of food, veterinarian fee, etc., required for the maintenance of a guide dog can be verified by the worker through

(Section Continued on Next Page)

156-25 (Continued)

156-25

It is assumed that only physicians and dentists may prescribe "medical prescriptions". Verification by a pharmacist of expenditures for drugs does not establish the need for such expenditures. Need for proprietary drugs if verified by the written statement of a physician, represents need in excess of basic continuing needs.

- (b) Eyeglass Prescriptions: When ordered by a physician, optician, or an optometrist.

4. Special Diets:

On the written recommendation of a physician and in the amount that special diet exceeds the cost of the normal diet, need in excess of basic continuing needs may be established.

5. Occasional Repairs of Homes Owned and Occupied by Recipients:

If necessary to provide safe and healthful housing, or to minimize deterioration, the expense of occasional repairs may be considered an excess need during the period in which the cost of such repairs is being paid. The plan for payment agreed upon between the contractor or vendor and the recipient should be recorded in detail.

6. Replacement of Worn-out Household Equipment and/or Supplies, Clothing, etc.:

Household furniture, equipment, and/or clothing may be inadequate or substandard to a point where the expense of securing necessary items is in excess of ordinary upkeep. This may be the situation of persons whose income, prior to receipt of aid, was insufficient to meet normal requirements. It also may result from a change in living plan. When such is the case, the cost of necessary replacement, or of augmenting the present supply may be established as excess need.

Replacement of household equipment and supplies, clothing, etc., destroyed in a catastrophe such as fire, flood, etc., may be considered need in excess of basic continuing needs to the extent that such possessions have not been covered by insurance.

7. Housekeeping Service:

The cost of housekeeping service or its equivalent in housekeeping equipment may be established as need in excess of basic continuing needs when the physical condition of the recipient is such that the service is required for the well-being of the individual recipient.

Similarly, when the circumstances of a blind recipient are such that he eats a majority of his meals in restaurants, excess need may be established in that amount by which the cost of restaurant meals

(Section Continued on Next Page)

156-30 (Continued)

156-30

September and it was verified that such private medical attention was needed. However, the recipient managed to pay \$8 of this bill without incurring other debts so that only \$10 could be considered current excess need in adjusting the October grant.

In the case of fluctuating income, or income received quarterly, semi-annually or annually, a plan of payment for needs in excess of continuing basic needs may be a promise to pay at the time and in the amount that income is received. For example, a recipient of ANB has an income of \$120 from an annuity payable on January 1 of each year. On July 1, 1944, need in excess of basic continuing need was established and verified for continuing medical care in the amount of \$10 a month. The recipient made arrangements with the physician to furnish medical care on credit, to be paid for when the annual income is received on January 1, 1945.

Payments made in advance for anticipated future medical care can not be considered as need in excess of basic continuing needs.

Since ANB is specifically granted to meet the current needs of the recipient and not a family group, need in excess of the grant of \$50 a month may only be established to meet current needs of the recipient. Unsecured debts incurred in the past are not a current need. (W&IC 3075, 3084)

156-40 METHOD OF REPORTING NEED IN EXCESS OF BASIC CONTINUING NEEDS
IN ANB
ANB

156-40

In every instance in which the cost of the actual need of a recipient exceeds the maximum statutory grant (\$50 a month) and income of the recipient is applied toward the additional need, the Certificate of Verification of Eligibility (Form B1 201) for new applications, or the Notice of Change (Form B1 232) for current cases shall show:

1. The source and amount of each item of income.
2. The particular need or needs in excess of the statutory maximum and how the need was established.
3. A statement of the verification which established the cost of the excess need. (W&IC 3075)

156-50 GRANT OF AID IN WHOLE DOLLAR AMOUNTS IN ANB
ANB

156-50

It is recognized that there are advantages to making grants of aid in whole dollars whenever possible. While certain types of income must be deducted in their exact amount, other types may be adjusted to make possible the grant of aid in a whole dollar amount. For certain other types of income which may be disregarded, see Secs. 150-50, Types of Casual Income and 150-40, Definition of Casual Income and Inconsequential Resources.

(Section Continued on Next Page)

156-25 (Continued)

156-25

a letter to one or more of the guide dog schools located in California. Experience with this type of need would seem to indicate that a maximum allowance of \$15.00 a month for the maintenance of a guide dog would be reasonable.

- (c) Telephone Service.
- (d) Radio and/or radio repairs.
- (e) Talking Book and/or Talking Book repairs.
- (f) Dry cleaning service.
- (g) Typewriter and/or Braille writer.
- (h) Artificial eyes.
- (i) Special appliances for the blind, such as white canes, watches, Braille slates, etc.

(W&IC 3084)

156-30 PROCEDURE FOR ESTABLISHING NEED IN EXCESS OF BASIC CONTINUING NEEDS IN ANB
ANB

156-30

The items listed in Sec. 156-25, Definition and Determination of Needs in Excess of Basic Continuing Needs in ANB, are not intended to be all inclusive and there are undoubtedly special needs of recipients which are not listed and which may well constitute an actual need. Conversely, the fact that an item has been listed as a possible need in excess of basic continuing needs does not imply that every expenditure for such item is automatically such a need.

The term "physician", when used in connection with the establishment and/or verification of need in excess of the basic grant for such items as Medical Care, Sanatorium and Rest Home Care, Medical Prescriptions or Special Diets, relates to a doctor who is licensed as a physician and surgeon under Chapter 5 of Division II of the Business and Professions Code. (This relates to physicians possessing M.D. degrees, and those possessing D.O. degrees who have a physician's and surgeon's certificate.)

The need for household repairs, and household replacements can best be evaluated by the worker in terms of the recipient's surroundings, household equipment, etc. The worker's determination of the need for other items, for which no specific method of determination is indicated, is adequate. In every case the record must show the verification secured and/or the facts or circumstances upon which the worker determined the need for the particular item established as an excess need. The probable period over which the need will continue shall also be recorded.

Income received shall not be designated to provide for specific items of need. The total income for any given period must be applied toward the total need for that period, and need in excess of basic continuing needs may be allowed only during the period that such need actually exists. However, since income received in the current month and the two preceding months is considered current income, an excess need that occurred in the two preceding months may be considered current need to the extent that the total need for that period remains unmet at the time of adjustment. For example, in August a recipient of ANB needed medical attention - total cost \$18. This became known to the county in

(Section Continued on Next Page)

156-50 (Continued)

(Continued) 156-50

Example D: An ANB recipient for whom there is no established need in excess of \$50 is furnished free utilities by a daughter the value of which is estimated at approximately \$4.35 a month. In addition he receives OASI in the amount of \$21.85 each month. The estimated income may be lowered to \$4.15 which, when added to the fixed income of \$21.85, adjusts the total income to \$26.00.

When reporting income on the Certificate of Verification of Eligibility (Form Bl 201) and the Notice of Change (Form Bl 232), the amount of income used in arriving at the amount of the grant should be reported. (W&IC 3075, 3084)

156-60 DETERMINATION OF AMOUNT OF GRANT FOR PERSONS IN PRIVATE INSTITUTIONS IN ANB ANB

156-60

A person who is receiving care in a nonprofit, fraternal, or benevolent institution is considered to have the equivalent of income in the amount by which the per capita cost of the institution exceeds the payment for board and care.

The per capita cost of the institution may be established as a part of the total need of an inmate toward which the total income of the individual shall be applied, provided the institution is one in which the inmates may be considered eligible to aid. (See Secs. 153-60, Income from Nonprofit, Fraternal or Benevolent Institution, 153-70, Income from Private Agencies or other Sources, 156-15, Method for Determining the Amount of the Grant in ANB, 163-00, Eligibility of Inmates of Nonprofit, Fraternal and Benevolent Institutions, 163-50, Per Capita Cost and Need in Nonprofit, Fraternal and Benevolent Institutions, 163-55, Determination of Per Capita Cost in Nonprofit, Fraternal and Benevolent Institutions, 163-95, Inmates in Private Institutions Operated for Profit.) (W&IC 3044.5, 3075)

156-50 (Continued)

156-50

A. INCOME WHICH MUST BE DEDUCTED IN ITS EXACT AMOUNT

Fixed income must be deducted in its exact amount.

Example A: A recipient is receiving OASI in the amount of \$21.19 each month. There is no other income and no established need in excess of \$50 a month. Aid shall be granted in the exact amount of \$28.81. (See Sec. 361-00, Increase in Amount of Aid.)

B. INCOME WHICH MAY BE ADJUSTED TO KEEP THE GRANT IN WHOLE DOLLARS

It is possible to keep grants of aid in whole dollar amounts when the income received is not in a regular or known fixed amount, by reducing such income to the nearest whole dollar; likewise, in case of excess need, when the difference between total need and total income is in odd cents, the grant may be computed in whole dollar amounts by increasing the grant to the next highest whole dollar.

The following are types of income which may be adjusted to whole dollars:

1. Regular income which is estimated as in the case of the value of a contribution in kind, such as free rent, free board and room, etc. (See Sec. 152-90, Value of Contributions in kind.)

Example B: A daughter, in whose home an ANB recipient lives, contributes his share of the utility bill. This is estimated to average about \$3.55 a month. This estimate may be reduced to \$3.00.

2. Irregular income of such a nature that consideration of the income received in the past is the only possible way of estimating the amount the recipient might reasonably expect to receive in the future. That amount which represents the monthly average over the preceding three months' period reduced to the nearest whole dollar may be deducted in determining the grant.

Example C: A recipient of ANB, not eligible for APSB (See Sec. 233-50, Verification of Plan for Self-Support, and Sec. 121-10, Blind While Not a Resident of California), tunes pianos and his exact income from month to month cannot be foretold. Income over the past three months has been as follows: June earnings \$9.50, July earnings \$3.00, August earnings \$12.75, total earnings \$25.25 or an actual monthly average of \$8.42. Therefore, \$8.00 is determined to be the recipient's average monthly income.

3. Grants of aid may usually be kept in whole dollar amounts when a case involves both fixed and adjustable income.

(Section Continued on Next Page)

157-15 METHOD FOR DETERMINING THE AMOUNT OF GRANT IN APSB
APSB

157-15

The income of the applicant from all sources, including APSB, shall be at least \$50 a month. (See Sec. 151-00, Definition of Income.) Amount of contributions actually received from legally responsible relatives in cash or kind shall be verified, so that the grant in aid will supplement this income to arrive at a total of \$50 a month, except that certain types of income other than contributions from responsible relatives is defined as exempt from inclusion in the \$50 a month, to a total of \$400 a year. (See Sec. 151-30, Definition of Exempt income in APSB.)

A blind person making application for aid having a regular monthly income in excess of \$83.33 per month is deemed to have income sufficient to provide a reasonable and decent standard of living, and is ineligible to aid.

A blind person receiving aid may have an income totaling \$400 a year from exempt sources (See Secs. 157-05, Provisions of W&I Code regarding Determination of Amount of Grant in APSB, and 151-30, Definition of Exempt Income in APSB), and continue to receive the maximum amount of aid, unless a smaller grant must be given because he is receiving contributions from legally responsible relatives. After the exempt income exceeds \$400 in a given year an adjustment must be made in the amount of aid that will supplement the income to arrive at a total income of \$50 a month from all sources, including the APSB grant. (See Sec. 361-15, Adjustment in Amount of Grant.) (W&IC 3460, 3472)

157-05 PROVISIONS OF W. & I. CODE REGARDING DETERMINATION OF AMOUNT OF GRANT IN APSB
APSB

157-05

The amount of aid to which any applicant for APSB shall be entitled shall be, when added to the net income of the applicant from all other sources, fifty dollars (\$50) per month. Net income from any of the following sources of a combined total value not exceeding four hundred dollars (\$400) per annum shall not be considered for any purpose:

1. Income from applicant's labor or services;
2. The value of foodstuffs produced by the applicant or his family for his use or that of his family;
3. The value of firewood and/or water produced on the premises of the applicant or given to him by another for the applicant's use;
4. The value of gifts other than regular contributions by relatives legally responsible under this act;
5. The value of the use and occupancy of premises owned and occupied by the applicant;
6. The net income from real and personal property owned by the applicant. Income in addition to the above specified shall be computed on the basis of net income.
(W&IC 3472)

Free board and lodging supplied to an applicant for APSB because of his necessity therefor, by a friend or relative who is not responsible for his support or who is financially unable to support him, shall not be a ground for refusing aid. (W&IC 3449)

The county board of supervisors shall investigate, annually or oftener, the qualifications of the blind persons receiving aid under the provisions of this chapter and may increase or decrease the allowance within the limits prescribed in this chapter, or, if the board is satisfied that any person receiving such aid is not entitled thereto, it shall deny him further aid and shall forthwith notify the county auditor and the Chief of the Division for the Blind in the SDSW of such action. The person receiving aid, however, shall have the right of appeal to the SSWB from such action. (See Secs. 151-30, Definition of Exempt Income in APSB, and 157-15, Method of Determining the Amount of Grant in APSB) (W&IC 3089, 3460)

MAIN OFFICE
616 K STREET
SACRAMENTO

LOS ANGELES OFFICE
WASHINGTON BUILDING
311 SOUTH SPRING STREET

SAN FRANCISCO OFFICE
DAVID HEWES BUILDING
995 MARKET STREET

EARL WARREN
GOVERNOR

STATE OF CALIFORNIA

DEPARTMENT OF SOCIAL WELFARE

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento
October 5, 1944

1944 OCT 13 AM 8 46

1299

MANUAL LETTER NO. 65

FILED
in the office of the Secretary of State
of the State of California
OCT 13 1944
FRANK M. JORDAN, Secretary of State
By *[Signature]* Deputy

The attached manual revisions are to be entered in your copy of the Manual of Policies and Procedures and the revision numbers cancelled on the separators for the revised chapters. Note that Revision Number 6 for the Fair Hearings chapter should be crossed off the separator received with this material at the time it is filed in your manual. The revision numbers are listed as follows:

Real Property	Revisions 63 and 64
Fair Hearing	Revision 6 and reissued separator
Continuing Services	Revision 32

The provisions of W&IC Sec. 2182.1 which provide that no filing fee nor bond for filing a petition in the Superior Court for review of an appeal decision of the State Social Welfare Board shall be required from an applicant or recipient of Old Age Security have been added to Sec. 326-20, Court Review of State Social Welfare Board Decision.

Provisions for notifying the State Department of Social Welfare of cancellation of transfer arrangements between counties have been added to Sec. 370-00, Transfer of Aid.

The issuance of this material renders obsolete the following bulletin material: Bull. 211, p. 17.

STATEMENTS CONTAINED IN THE MANUAL TAKE PRECEDENCE
OVER SAME MATERIAL PREVIOUSLY RELEASED IN BULLETINS

132-07 DETERMINATION OF VALUE OF UNASSESSED REAL PROPERTY 132-07
OAS, ANB, APSB, ANC

When an interest in real property, such as unpatented mining claims, timber, oil or mineral rights or leaseholds, cemetery property held for profit, etc., is declared but is not listed on the local assessment rolls, it shall be referred to the county assessor to determine whether or not it is assessable, and if assessable, its assessed value. The assessed value so determined shall be used in establishing eligibility to OAS, ANB, APSB and ANC. (W&IC 1560, 2140, 3075, 3460; REV. & TAX. C. 201, 531; AGO NS1044)

In OAS, any place of abode of an applicant or recipient, whether house, boat, trailer, or other habitation, is considered real property, and the county assessed valuation of any such place of abode shall be determined and taken into consideration in computing the total county assessed value of real property. If such place of abode is declared by the applicant or recipient to be his property but is not listed in the local assessment rolls, such property shall be referred to the county assessor to determine whether it is assessable, and if assessable, its assessed value. If investigation reveals that such property is not assessable or it is impossible to obtain the county assessed value, the current market value of the property shall be obtained and this value substituted for the county assessed valuation in computing the total county assessed value of real property of the applicant or recipient. (See SECS. 132-00, LIMITATION ON ASSESSED VALUE OF REAL PROPERTY, AND 132-03, ENCUMBRANCES OF RECORD DEDUCTED FROM ASSESSED VALUE OF REAL PROPERTY.) (W&IC 2140, 2163.7)

Burial space is generally considered real property. Property used or held exclusively for burial, except when held for profit, is not subject to local assessment. For the purpose of establishing eligibility for aid, when the assessed value of the other real property holdings approaches the maximum permitted for the specific category of aid, the value of any cemetery, mausoleum, or columbarium property intended for the use of the owner or his family shall be determined in accordance with the assessed value of similar property which is held for profit in the same or another comparable cemetery, mausoleum or

(Section Continued on Next Page)

**132-03 ENCUMBRANCES OF RECORD DEDUCTED FROM ASSESSED VALUE
OF REAL PROPERTY
OAS, ANB, APSB****132-03**

Encumbrances of record shall be deducted from the county assessed value of real property before the \$3,000 limitation on county assessed value is applied in determining eligibility. Encumbrances include any debt for which the property is security but to be deductible, the encumbrance shall be a written record the discharge of which requires the payment of money. (SEE GLOSSARY-ENCUMBRANCES.) The existence, amount, and duration of all encumbrances to be deducted from the applicant's property shall be determined and accurately recorded. (SEE SECS. 132-00, LIMITATION ON ASSESSED VALUE OF REAL PROPERTY, AND 132-07, DETERMINATION OF VALUE OF UNASSESSED REAL PROPERTY.)

A search of the county recorder's records may be necessary for verification of an encumbrance against real property. Verification of the amount of the unpaid balance and the duration of the encumbrance may be made by interview or correspondence with the holder of a mortgage or note and/or by inspection of the document. (SEE SEC. 233-00, VERIFICATION OF REAL AND PERSONAL PROPERTY.)

Some of the more common types of encumbrances on real property are:

Mortgages	Judgment liens	Builders' liens
Deeds of trust	Loans	Assessments
Delinquent tax liens	Mechanics' liens	Attachments

(W&IC 1520, 1560, 2140, 2164, 2165, 3047, 3075, 3447, 3460; AGO NS5134)

**132-10 ASSESSED VALUE NOT AFFECTED BY TAX EXEMPTIONS
OAS, ANB, APSB, ANC****132-10**

Some persons, including veterans, and in some instances, widows and parents of veterans, are allowed certain exemptions from tax payments, i.e., a fixed sum is deducted from the true assessed value of property before the amount of tax payment is established.

The true assessed value of property is considered in determining eligibility in the categorical aids. Exemptions allowed for tax purposes are not deducted in determining total assessed value.

In some counties, assessor's records show the true assessed value while in other counties the assessed value for tax purposes only is given. The method in use in each county shall be ascertained. When the exemption is deducted before entry in the assessor's records the exact amount of exemption shall be added to the recorded sum to determine true assessed value. (W&IC 1560, 2140, 3075, 3460)

**132-15 ASSESSED VALUE OF REAL PROPERTY OUTSIDE OF STATE
OAS, ANB, APSB, ANC****132-15**

Property, both within and without the State, is included in the assessed value of real property. For exception in OAS, see Sec. 131-18, Ownership of Real Property by Separated Spouse. In other states, assessed value is not necessarily fifty per cent of appraised value as is true in California. The difference in the assessment rate, however, does not affect eligibility for the particular category of aid. (SEE SEC. 132-30, DETERMINATION OF ASSESSED VALUE OF REAL PROPERTY.) (W&IC 1520, 1560, 2140, 2165, 3047, 3075, 3447, 3460; AGO NS308, NS1715)

132-07 (Continued)

132-07

columbarium. It is suggested as a guide, when the total assessed value of other holdings exceeds \$2,800 that such determination be made. (W&IC 1520, 1560, 2140, 2165, 3047, 3075; 3447, 3460; CAL CONST. ART. XIII SEC. 1B)

EXAMPLE A: MR. A OWNS THREE GRAVE PLOTS. ONE OF THE PLOTS IS OCCUPIED, ONE IS RESERVED FOR THE USE OF HIS WIFE, ONE FOR HIS OWN USE. COMPARABLE LOTS WHICH ARE HELD FOR PROFIT IN THE SAME CEMETERY ARE ASSESSED AT \$15 EACH. IT WOULD BE CONSIDERED, THEREFORE, THAT THE COUNTY ASSESSED VALUE OF THE REMAINING PLOTS IS \$15 EACH. THE SUM OF \$30 WOULD BE ADDED TO THE COUNTY ASSESSED VALUE OF MR. A'S OTHER REAL PROPERTY HOLDINGS IN DETERMINING HIS ELIGIBILITY ACCORDING TO THE PROVISIONS OF THE RESPECTIVE CATEGORY OF AID.

EXAMPLE B: MRS. B OWNS TEN CEMETERY PLOTS WHICH SHE IS HOLDING FOR INVESTMENT PURPOSES. THE COUNTY ASSESSOR STATES THAT THE ASSESSED VALUE OF THESE PLOTS IS \$150. THE SUM OF \$150 IS ADDED TO THE COUNTY ASSESSED VALUE OF MRS. B'S OTHER REAL PROPERTY HOLDINGS IN DETERMINING HER ELIGIBILITY ACCORDING TO THE PROVISIONS OF THE RESPECTIVE CATEGORY OF AID.

REFERENCE GUIDE TO FAIR HEARING CHAPTER

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REVISION RECORD

Revisions issued in changing this chapter will be numbered in sequence. Changes made will be indicated by a vertical line in the margin of the corrected page, against the line or lines changed.

IT IS IMPORTANT that the holder of this Manual check the numbers below, corresponding with the numbers of the revisions when the latter have been incorporated in the Manual and the old pages removed, and that the State Department of Social Welfare be promptly notified in the event a number is passed without receipt of the corresponding numbered sheet.

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326-00 RE-APPLICATION FOR AID AFTER DENIAL OF APPEAL
OAS**326-00**

An applicant whose appeal has been denied by SSWB may not again apply for aid until one year has elapsed from the date of his previous application except with the county's consent or by order of SDSW. A change in applicant's circumstances before a year has elapsed following the denial of his application is occasion for the county to reconsider his eligibility. (SEE SEC. 325-95, RE-APPEALS.) (W&IC 2140, 2182)

326-05 APPEAL REGARDING DEGREE OF BLINDNESS
ANB, APSB**326-05**

See Sec. 180-25, Successive Eye Examination Reports, regarding procedure for securing reports of eye examinations when appeal is based on degree of blindness. (W&IC 3075, 3078, 3086, 3089, 3460, 3473)

326-10 APPEAL FROM COUNTY INACTION
OAS, ANB, APSB, ANC**326-10**

A person has the right of appeal to the SSWB when the county fails or refuses to receive an application for aid. In such an appeal, if there is a dispute as to the facts, the appellant submits to the SDSW a personal affidavit containing the fact that the county has failed or refused to receive his application for aid and giving the reason he believes himself eligible.

The SDSW investigation in this type of appeal establishes only the facts concerning the point at issue and the point or points of eligibility in the controversy. The SSWB may order the county to take the application and may inform the county as to the appellant's eligibility on the point or points of controversy. Should the county subsequently deny such application, the applicant may then appeal against county denial. (W&IC 1551, 1560, 2140, 2182, 3075, 3078, 3086, 3089, 3460, 3473)

**325-90 DISPOSITION OF CASE AFTER
STATE SOCIAL WELFARE BOARD DECISION
OAS, ANB, APSB, ANC****325-90**

The county shall pay the appellant the amount of aid awarded by the SSWB, if a grant of aid is ordered, or carry out any other order of the SSWB. If the county fails to comply with the SSWB decision within 60 days or a reasonable period of time, the SSWB may cite the county to show cause for its failure to make the grant as directed. The SSWB may withhold State and Federal categorical aid funds from the county to enforce compliance with a SSWB decision.

When, after the SSWB has taken action on an appeal, there is a change in the appellant's circumstances the case is handled according to ordinary routine procedures. Further referral to the SSWB is not necessary unless a new basis for appeal arises. (W&IC 1551, 1560, 2140, 2182, 3075, 3078, 3086, 3089, 3460, 3473)

**325-95 RE-APPEALS
OAS, ANB, APSB, ANC****325-95**

A person, or county, may not be satisfied with the decision of the SSWB regarding an appeal because it is believed that all pertinent facts were not available and/or not considered at the hearing. Additional evidence may be submitted by appellant or county to the SDSW for presentation to the SSWB with a request for a rehearing. When the SSWB decides that the additional evidence is pertinent and has not been considered at the appeal hearing, another hearing may be granted.

In OAS a person may not appeal again until a year has elapsed, unless there is new evidence. After the expiration of a year, the appellant, if he desires, has the right to appeal again regardless of the lack of evidence. (W&IC 1551, 1560, 2140, 2182, 3075, 3078, 3086, 3089, 3460, 3473)

**330-00 DISPUTE REGARDING RESPONSIBILITY FOR AN APPLICANT
OAS, ANB, APSB, ANC**

330-00

When a dispute arises between two counties regarding that county which is responsible for the support of an individual, either county may submit the dispute to the SDSW. The SDSW shall weigh the evidence presented and fix responsibility for support.

When a county wishes to refer to the SDSW a dispute with another county as to responsibility for payment of aid, Appeal as to Responsibility for Support (Form DPA 6) after completion by signature of the chairman of the board of supervisors, shall be submitted in triplicate to the SDSW. Additional data shall be submitted to the SDSW with Form DPA 6 and should include information as to the counties in which the applicant, or in ANC the child or person who determines the residence of the child/children, has resided, with the dates of such residence, and the information on which there is not agreement. (SEE FORM DPA 6, SEC. 330-99.)

Upon receipt of the appeal, the SDSW sends a copy of Form DPA 6 to the chairman of the board of supervisors and county welfare director in the other interested county or counties and requests a report from them. If no reply is received from the other county or counties within 30 days, the SDSW renders its decision on the basis of the facts known to it.

When no conflict is revealed in the facts reported by the counties, such facts are presumed to be correct. When a conflict exists, the SDSW draws this to the attention of the counties concerned and requests an additional investigation and report. As a general rule, the SDSW does not make an investigation or interview the person concerned but renders its decision upon the basis of the facts presented by the counties. The decision of the SDSW may be appealed to the SSWB.

In an appeal to the SSWB the decision of the SDSW is presented and the counties submit their contentions by letter, brief, or verbal argument at the time of hearing. (W&IC 1528, 1560, 2140, 2143, 3075, 3092, 3460, 3463)

**326-20 COURT REVIEW OF STATE SOCIAL WELFARE BOARD DECISION
OAS, ANB, APSB, ANC****326-20**

If the applicant or recipient is dissatisfied with any decision of the SSWB, he may file with the Superior Court of the county in which he resides, a petition, praying for a review of the entire proceedings in the matter, upon questions of law involved in the case. If the court should, when the decision is in favor of the applicant, make a finding as to attorney's fees and costs, such fees and costs would be charged as indicated by the court's ruling. (W&IC 1560, 2140, 2182, 3075, 3460)

In OAS, no filing fee shall be required from an applicant for or recipient of aid for the filing of a petition in the Superior Court for a review of the proceedings in his case, nor shall a bond be required in the case of any petition for review, nor in any appeal therefrom. In OAS, if the decision of the court is in favor of the applicant or recipient of aid, aid shall be paid from the first of the month following date of application therefor, and the applicant or recipient shall be entitled to reasonable attorney's fees and costs. (W&IC 2140, 2182, 2182.1)

**370-05 MEDICAL CARE DURING TRANSFER PERIOD
OAS, ANB, APSB, ANC****370-05**

The county to which a recipient of OAS, ANB or APSB has removed shall provide the necessary medical and/or hospital care if needed during the one-year period of establishment of residence. The county may demand payment of the county granting the aid in an amount not exceeding the cost thereof. It shall be a proper charge, and the duty of the county granting aid to pay such medical and/or hospital charges. (W&IC 2140, 2200, 3090, 3450)

In ANC, the county to which child receiving aid has removed shall provide necessary medical and/or hospital care during the one-year period of establishment of residence. Except in emergency cases the county giving such care shall give immediate notice to the county granting ANC. This county shall accede to the plan of the county giving medical or hospital care within thirty days of receipt of notice or shall submit an adequate substitute plan. If such county fails so to do within thirty days the county offering medical and hospital care may proceed to demand payment for such care from the county granting aid. Costs of such care shall be a proper charge upon county granting aid. (W&IC 1527, 1560)

370-00 (Continued)

370-00

It is possible that evidence which verified eligibility when the application was submitted by the first county will be inadequate upon review by current standards. In order that there may be no question as to current eligibility the second county should attempt to strengthen any evidence which is now substandard unless the passage of time leaves no question regarding current eligibility. For example, supporting evidence of residence as accepted when aid originally began need not be strengthened in the case of a recipient of OAS who has received aid during the five-year period preceding the granting of aid through the second county.

When the responsibility for payment of aid is transferred from the first to the second county, the beginning date of aid in the second county may antedate the signing of the application in the second county. The person concerned shall not lose his aid because the application has not been signed prior to the date on which the second county is responsible for payment of aid. (SEE SEC. 122-67, CONTINUOUS PAYMENT OF AID IN TRANSFERRED CASE.)

Should a regular OAS or ANB recipient, or in APSB a non-Federal recipient having residence in a second county establish residence in a third county before completing one year of residence in the second county, the second county has no responsibility for payment of aid. In ANC, this applies if the child's residence changes from the second to a third county prior to the completion of one year's residence in the second county. Payment of aid remains the responsibility of the first county until the end of the month following the completion of a one-year period from the date residence in the second county was established, but not beyond that date. Payment of aid thereafter by the third county is on a non-county basis. (SEE SEC. 122-65, REMOVAL OF TRANSFERRED RECIPIENT TO A THIRD COUNTY.) The first county shall notify the third county of the removal to the third county as soon as this information comes to attention and shall request the second county to forward to the third county such documents as were furnished the second county by the first county at the time transfer arrangements were made with the second county.

The first county should notify the SDSW by letter should the transfer arrangements be canceled for reason other than discontinuance of aid, giving the reason for cancellation. If aid is discontinued before the transfer to the second county becomes effective, notification by letter is unnecessary as the Notice of Change reporting the discontinuance is sufficient. (W&IC 1527, 1560, 2140, 2209, 3075, 3090, 3450, 3460.)

MAIN OFFICE
SACRAMENTO
616 K STREET
(14)

LOS ANGELES OFFICE
WASHINGTON BUILDING
311 SOUTH SPRING STREET
(13)

SAN FRANCISCO OFFICE
DAVID HEWES BUILDING
995 MARKET STREET
(3)

Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento
October 5, 1944

FILED
In the office of the Secretary of State
of the State of California

OCT 23 1944

FRANK M. JORDAN, Secretary of State

By *Am. J. J. J.*
Deputy

WAR SERVICES HANDBOOK LETTER NO. 8

IN REPLY PLEASE REFER
TO:

- Subject: (1) Revisions in Monthly Statistical Report on Services and Assistance to Enemy Aliens and other Persons in Need Because of Restrictive Action of the Federal Government (Form WS-7) Secs. WS 41-00, 41-05, 41-10, 41-15, 41-20
- (2) Revisions in War Services Data Form (Form WS-9) Sec. WS 44-00

The attached revisions 3 thru 11 to Chapter IV, Reporting Procedures, are to be entered in your copy of the War Services Handbook and the revision numbers cancelled on the attached reissued separator for the revised chapter.

The revised sections refer to monthly statistical reports on the Enemy Alien program (Form WS-7) and the War Services Data Form (WS-9), which have been made necessary by changes in the Social Security Board's requirements for statistics.

You will find that the statistical report on Enemy Aliens has been changed in the following respects:

- (1) The breakdown of source of requests and referrals has been omitted.
- (2) The section on cases certified to protective powers has been omitted.
- (3) Data on cases receiving service only and cases receiving assistance have been broken down by type of case.
- (4) The breakdown of obligations incurred for assistance has been omitted.

You will also note a change in the definition of "service" in Sec. 41-20. The original instructions were to the effect that service cases were to include only those for which the provision of service extended beyond the initial interview. This has been revised in Sec. WS 41-20, Item 3 to read "only cases receiving service other than, or in addition to, the provision of information should be reported as cases receiving service." (The Social Security Board has not changed the definition of "service" for Civilian War Assistance cases, however).

The change in the definition of "service" means that requests for information only are not to be reported on the monthly statistical report for the Enemy Alien program. Likewise, a War Services Data Form should not be made for individuals requesting information only under the Enemy Alien program.

Revisions in the War Services Data Form (Form WS-9) have been made necessary by the changes in the monthly statistical report on the Enemy Alien program (Form WS-7). These revisions now included in Sec. WS 44-00 are:

- (1) The breakdown of type of program and reason for eligibility under the Enemy Alien program has been changed to fit the breakdown on the statistical report.
- (2) The item for disposition of cases in which action is at initial interview has been omitted.

In addition, two other revisions have been made:

- (3) An item has been added to the breakdown of Civilian War Assistance cases for "Civilian evacuated from Pacific Area other than Hawaii".
- (4) The summary record of assistance and services given has been omitted. Use of this section formerly was optional with the county.

The Social Security Board makes this statement with respect to the changes made in reporting the Enemy Alien program:

"The enemy alien program since July 1, 1944 is being financed jointly through a nucleus appropriation by Congress and a transfer of funds from the War Relocation Authority. It is anticipated that the Immigration and Naturalization Service will also participate financially in the program at a later date. This change in financing the program has necessitated the revision in reporting, since data are required for estimating the share of these other agencies."

We ask that you use these new forms and instructions for your report of activity during the month of October (or the first month hereafter in which activity occurs).

We also request that you report September activities on the new forms, even though September reports may have been submitted on the old forms. The September reports may be submitted with the October reports. War Services Handbook sections WS 41-25 and 41-30 have been deleted.

REVISION RECORD

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**MONTHLY STATISTICAL REPORT ON SERVICES AND ASSISTANCE
TO ENEMY ALIENS AND OTHER PERSONS IN NEED BECAUSE OF
RESTRICTIVE ACTION OF THE FEDERAL GOVERNMENT**

Report for month of _____ County _____

A. REQUESTS AND REFERRALS**NUMBER**

1. Requests and referrals received during month.....
2. Requests and referrals disposed of during month (sum of 2a and 2b)..
- a. Approved for service and/or assistance.....
- b. Rejected or otherwise disposed of.....

B. CASES RECEIVING SERVICE AND/OR ASSISTANCE AND AMOUNT OF ASSISTANCE DURING MONTH**Number**

3. Cases receiving service only (sum of 3a, 3b, and 3c).....
- a. Immigration and Naturalization Service cases.....
- b. War Relocation Authority cases.....
- c. Other cases.....

	Number of cases receiving assistance during month			Amount of Assistance
	Total	Receiving assistance for first time	Received assistance in a previous month	
	I	II	III	IV
4. Cases receiving assistance(4a+4b+4c)				\$
Type of case:				
a. Immigration and Naturalization Service (sum of (1) through (4))				\$
(1) Persons unconditionally released or paroled from detention or internment or their dependents.....				
(2) Persons interned at large....				
(3) Dependents of persons detained or interned.....				
(4) Other (specify).....				
.....				
b. War Relocation Authority ((5)+(6))				\$
(5) Persons released from a war relocation center or their dependents.....				
(6) Other (specify).....				
.....				
c. Other (sum of (7) through (9))..				\$
(7) Persons voluntarily evacuated from a prohibited zone or area.....				
(8) Persons removed from a prohibited area under an individual exclusion order....				
(9) Other (specify).....				
.....				

Date _____ Name of person reporting _____

Title _____

...the ... of ...

1. The first part of the document is a list of names and addresses, which appears to be a directory or a list of contacts. The names are listed in a column, and the addresses are listed in a column next to them.

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3. The third part of the document is a list of names and addresses, which appears to be a directory or a list of contacts. The names are listed in a column, and the addresses are listed in a column next to them.

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10. The tenth part of the document is a list of names and addresses, which appears to be a directory or a list of contacts. The names are listed in a column, and the addresses are listed in a column next to them.

Sec. WS 41-00 Instructions for Monthly Statistical Report on Services and Assistance
WSE to Enemy Aliens and Other Persons in Need Because of Restrictive
Action of the Federal Government
Form WS 7

This report relates to the operations of county welfare departments in providing services and assistance in individual situations (as distinguished from controlled mass removals) to enemy aliens and other persons, and the dependents of such enemy aliens and other persons, who are in need because of restrictive action of the Federal Government in the form of removal orders or official announcements that such orders will be issued, regulations governing conduct within designated military, prohibited, or restricted areas, detention of enemy aliens, and internment of enemy aliens. Instructions for the report are in the following sections.

Sec. WS 41-05 Submission of Report
WSE

The report is to be prepared monthly by county welfare departments. The original is to be sent to the Division of Research and Statistics, SDSW, in time to be received not later than the eighth of the month following that to which it applies. The first report on Form WS 7 should cover the first month in which the county has had requests for assistance and/or service under this program. If, in any subsequent month, no operations occur under this program, this fact may be reported by letter. The statistical report should be accompanied by a War Services Data form (Form WS-9) for each request for assistance and/or services under the Enemy Alien Program disposed of during the month.

Sec. WS 41-10 Definition of Case
WSE

The term "case" as used in this report means an individual or a family group. The term includes: (a) wives, children, or husbands, whether alien or non-alien, of persons affected; and (b) other persons, whether alien or non-alien who are actually dependent upon and have been receiving substantial maintenance from the person affected.

Sec. WS 41-15 Part A. Requests and Referrals
WSE

Item 1.---Enter the total number of requests and referrals received during the month for service and/or assistance under this plan. Consider as requests direct applications made by families or individuals for service or assistance available under this plan, and as referrals families or individuals whose names have been referred to the county as possibly eligible for and in need of service or assistance under this plan and who have been or are to be contacted by the county.

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Do not count as requests for service inquiries that are disposed of merely by providing information.

Item 2.---Enter the sum of entries 2a and 2b. Citizens of enemy countries in need for reasons other than restrictive action of the Federal Government are not eligible for service or assistance under this plan, and requests by, and referrals of, such persons should, therefore, be reported in item 2b, even though the country may make provision for certifying such persons to receive assistance from protective powers.

Item 2a.---Enter the number of requests and referrals disposed of during the month through the approval of cases to receive service and/or assistance. Do not count as approved requests inquiries that are disposed of merely by providing information.

Item 2b.---Enter the number of requests and referrals rejected because of ineligibility under this plan or otherwise disposed of during the month.

Sec. WS 41-20 Part B. Cases Receiving Service and/or Assistance and Amount of Assistance During Month

In this section of the report cases are to be classified as: Immigration and Naturalization service cases, War Relocation Authority cases, and Other cases.

Cases in which the restrictive action consists of detention or internment of an enemy alien in custody of the Immigration and Naturalization Service of the Department of Justice are to be regarded for purposes of this report as Immigration and Naturalization service cases.

Cases in which the restrictive action consisted of removal of a person or family to a war relocation center⁽¹⁾ are to be regarded as War Relocation Authority cases.

Cases in which the restrictive action was other than detention, internment or removal to a war relocation center are to be classified as "other".

In a few instances more than one type of restrictive action may be taken against the same person or family, e.g., an enemy alien may have been removed to a relocation center and later relocated, but was subsequently interned. In such situation cases should be classified according to the most recent restrictive action.

Cases of citizens of enemy countries certified during the month to receive assistance from protective powers should be shown in this report only if they are eligible for service and/or assistance under this plan, i.e., in need because of restrictive action of the Federal Government.

- (1) A few persons were released directly from assembly centers without going to relocation centers. For purposes of this report such persons, if given assistance or service, are to be shown as War Relocation Authority cases.

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Item 3.—Enter the sum of items 3a, 3b, and 3c. Only cases receiving service other than, or in addition to, the provision of information should be reported as cases receiving service.

Item 3a.—Enter the number of Immigration and Naturalization Service cases receiving service, but not receiving assistance, under this plan during the month.

Item 3b.—Enter the number of War Relocation Authority cases receiving service, but not receiving assistance, under this plan during the month.

Item 3c.—Enter the number of cases other than the types shown in items 3a and 3b receiving service, but not receiving assistance, under this plan during the month.

Item 4.—Enter in columns I-IV the sum of items 4a, 4b, and 4c. Cases certified to receive assistance from protective powers receiving emergency assistance for which the county is to be reimbursed by the protective powers should not be reported in this item unless other persons in the same cases received assistance to be paid for by the Social Security Board under this plan.

Item 4a.—Enter in column I the total number of Immigration and Naturalization Service cases that received assistance under this plan during the month. This figure should equal the sum of items 4a (1) to 4a (4), column I, and should also equal the sum of columns II and III, item 4a.

Enter in column II the number of Immigration and Naturalization Service cases that received assistance this month for the first time under this plan.

Enter in column III the number of Immigration and Naturalization Service cases that received assistance this month and had received assistance under this plan in a previous month.

Enter in column IV the total amount of expenditure for assistance to Immigration and Naturalization Service cases during the month. This should represent the total amount of obligation incurred for assistance in the form of money payments, relief orders, or commodities, to persons in these cases eligible for aid under this plan. It should include only obligations for assistance to be paid for by the Social Security Board. Obligations incurred for emergency assistance to citizens of enemy countries certified to receive assistance from protective powers should not be included.

Expenditures for assistance should be reported, insofar as possible, on the basis of obligations incurred for the month, i.e., assistance should be reported for the month for which it is authorized. Counties unable to report on this basis may report on the basis of obligations incurred during the month.

Item 4a (1).—Enter the number of cases consisting of persons unconditionally released or paroled from detention or internment or the dependents of such persons, that received assistance under this plan during the month.

Item 4a (2).—Enter the number of cases consisting of persons interned at large that received assistance under this plan during the month.

DECLARATION OF EMERGENCY

Page 1

I, the undersigned, being a resident inhabitant of the District of Columbia, do hereby certify that the following is true and correct to the best of my knowledge and belief:

That the public health, safety, and interest of the District of Columbia require the immediate enactment of the following ordinance:

That the following ordinance is necessary for the preservation of the public health, safety, and interest of the District of Columbia:

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Item 4a (3).---Enter the number of cases consisting of dependents of persons currently held under detention or internment that received assistance under this plan during the month.

Item 4a (4).---Enter the number of other Immigration and Naturalization Service cases that received assistance under this plan during the month, and indicate the type(s) of cases.

Item 4b.---Enter in column I the total number of War Relocation Authority cases that received assistance under this plan during the month. This figure should equal the sum of items 4b (5) and 4b (6), column I, and should also equal the sum of columns II and III, item 4b.

Enter in column II the number of War Relocation Authority cases that received assistance this month for the first time under this plan.

Enter in column III the number of War Relocation Authority cases that received assistance this month and had received assistance under this plan in a previous month.

Enter in column IV, the total amount of expenditures for assistance to War Relocation Authority cases during the month. (See item 4a, column IV for definition of assistance and method of reporting expenditures for assistance.)

Item 4b (5).---Enter the number of cases consisting of persons released from a war relocation center, or the dependents of such persons, that received assistance under this plan during the month.

Item 4b (6).---Enter the number of other War Relocation Authority cases that received assistance under this plan during the month, and indicate the type(s) of cases.

Item 4c.---Enter in column I the total number of cases other than Immigration and Naturalization Service and War Relocation Authority cases that received assistance under this plan during the month. This figure should equal the sum of items 4c (7) to 4c (9), column I, and should also equal the sum of columns II and III, item 4c.

Enter in column II the number of cases classified as "other" that received assistance this month for the first time under this plan.

Enter in column III the number of "other" cases that received assistance this month and had received assistance under this plan in a previous month.

Enter in column IV the total amount of expenditures for assistance to "other" cases during the month. (See item 4a, column IV for definition of assistance and method of reporting expenditures for assistance.)

Item 4c (7).---Enter the number of cases consisting of persons voluntarily evacuated from a prohibited zone or area that received assistance under this plan during the month.

Item 4c (8).---Enter the number of cases consisting of persons removed from a prohibited area under an individual exclusion order that received assistance under this plan during the month.

Item 4c (9).---Enter the number of all other cases that received assistance under this plan during the month, and indicate the type(s) of cases.

WAR SERVICES DATA FORM

1. NAME _____ COUNTY _____ CASE No. _____

2. ALIASES _____

3. ADDRESS _____

4. NUMBER OF PERSONS IN THIS GROUP _____

5. COUNTRY OF CITIZENSHIP _____

6. SOURCE: ☐ A. DIRECT APPLICATION ☐ B. REFERRED BY _____

7. STATUS: ☐ A. INITIAL REQUEST ☐ C. CHANGE OF PROGRAM
☐ B. SUBSEQUENT REQUEST ☐ D. FORMER W.S. CASE IN ANOTHER COUNTY

8. TYPE OF PROGRAM AND REASON FOR ELIGIBILITY

A. ENEMY ALIEN PROGRAM

(1) IMMIGRATION AND NATURALIZATION SERVICE

- ☐ (A) PERSONS UNCONDITIONALLY RELEASED OR PAROLED FROM DETENTION OR INTERNMENT OR THEIR DEPENDENTS.
- ☐ (B) PERSONS INTERNED AT LARGE.
- ☐ (C) DEPENDENTS OF PERSONS DETAINED OR INTERNED.
- ☐ (D) OTHER (SPECIFY) _____

(2) WAR RELOCATION AUTHORITY

- ☐ (E) PERSONS RELEASED FROM A WAR RELOCATION CENTER OR THEIR DEPENDENTS.
- ☐ (F) OTHER (SPECIFY) _____

(3) OTHER

- ☐ (G) PERSONS VOLUNTARILY EVACUATED FROM A PROHIBITED ZONE OR AREA.
- ☐ (H) PERSONS REMOVED FROM A PROHIBITED AREA UNDER AN INDIVIDUAL EXCLUSION ORDER.
- ☐ (I) OTHER (SPECIFY) _____

B. CIVILIAN WAR ASSISTANCE

- ☐ (1) CIVILIANS INJURED AND/OR THEIR DEPENDENTS.
- ☐ (2) DEPENDENTS OF CIVILIANS KILLED, DETAINED OR INTERNED BY ENEMY, OR REPORTED MISSING.
- ☐ (3) PROPERTY DAMAGE AND/OR DESTRUCTION.
- ☐ (4) CIVILIANS REPATRIATED TO THE UNITED STATES.
- ☐ (5) OTHER RESULTS OF ENEMY ACTION _____
- ☐ (6) CIVILIANS EVACUATED FROM HAWAII.
- ☐ (7) CIVILIANS EVACUATED FROM PACIFIC AREA OTHER THAN HAWAII.
- ☐ (8) CIVILIANS EVACUATED FROM DANGER POINTS IN CONTINENTAL U.S.
- ☐ (9) OTHER EVACUATION PLANS _____

9. DISPOSITION:

- ☐ A. APPROVED FOR ASSISTANCE AND/OR SERVICE
- ☐ B. REJECTED OR OTHERWISE DISPOSED OF (GIVE REASONS) _____

10. DATE OF REFERRAL (IF ANY) TO U.S. PUBLIC HEALTH SERVICE _____

11. PERSONS IN CASE: (ITEMS 11 AND 12 TO BE FILLED OUT ONLY FOR CASES ACCEPTED AS INDICATED IN 9A)

A. NAME	B. RELATION TO HEAD	C. BIRTH DATE	D. OCCUPATION AND INDUSTRY	E. REMARKS	ENEMY ALIEN PROGRAM ONLY		
					COUNTRY OF		H. ALIEN REGISTRA- TION No.
					F. BIRTH	G. CITIZEN- SHIP	
	HEAD						

12. DETAINED OR INTERNED MEMBERS OF FAMILY GROUP (USE ONLY FOR ENEMY ALIEN PROGRAM)

A. NAME	B. TAKEN INTO CUSTODY		C. PAROLE DATE	D. RELEASE DATE	E. INTERNMENT	
	DATE	PLACE			DATE	PLACE

13. REMARKS: (CONTINUE ON REVERSE SIDE IF NECESSARY)

DATE OF INTERVIEW _____

PERSON COMPLETING FORM _____

TITLE _____

Sec. WS 44-00 Instructions for Preparation of War Services Data Form (Form WS-9)
WSE; WSC

The War Services Data Form (Form WS-9) is to be filled out for all individuals or families requesting services and/or financial aid under the programs for Services and Assistance to Enemy Aliens and Other Persons in Need Because of Restrictive Action of the Federal Government, and Civilian War Assistance.

Two copies of the Data Form are to be made for each request, one to be retained by the county and the other to be forwarded to the SDSW. Copies to be sent to the SDSW should be forwarded at the end of the month during which disposition of the request has been made. (See instructions for item 9, Disposition.) At that time, (1) data forms representing requests disposed of under the Enemy Alien Program should be attached to the Monthly Statistical Report on Services and Assistance to Enemy Aliens (Form WS-7); and (2) those representing requests disposed of under Civilian War Assistance should be attached to the Monthly Statistical Report on Civilian War Assistance (Form WS-6).

Data forms for requests received but not disposed of during the month should be held until the end of the month in which disposition is made.

The WS 9 should be prepared only at the time of disposition of the request. None should be submitted for cases continuing to receive service or assistance in subsequent months.

Items 1 through 10 are to be filled out for rejected as well as accepted requests and referrals. Items 11 and 12 need be filled out only for cases approved for service and/or assistance.

- Item 1. Name. Type or print the full name of the head of family or the individual making the request, giving last name first, then first and middle name.
- Item 2. Aliases. Indicate any other name or spelling of name used by the applicant.
- Item 3. Address. Enter street-number, street and town or city.
- Item 4. Number of persons in this group. Enter the number of persons for whom assistance and/or service is requested.
- Item 5. Country of Citizenship. Enter the country of citizenship of the head of family or the individual making the request.
- Item 6. Source. If the applicant applied directly, check 6A. If the individual was referred, check 6B and enter the name and address of the referring agency or person.
- Item 7. Status.
 - A. Initial request. Check this item if applicant is reported on War Services Data Form for the first time.

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1. The first part of the document is a list of names and titles, including "The Hon. Mr. Justice" and "The Hon. Mr. Justice".

- B. Subsequent request. This item is to be checked if applicant has made a previous request, for which a War Services Data Form has been submitted.
- C. Change of program. Check this item for cases transferred during the month from the Enemy Alien Program to Civilian War Assistance or from Civilian War Assistance to the Enemy Alien Program.
- D. Former W.S. Case in another county. Check this item if the applicant has received assistance and/or service under one of the War Services Programs (either Enemy Alien Program or Civilian War Assistance) in another county in California.

Item 8. Type of Program and Reason for Eligibility

All requests are to be classified under either 8A, Enemy Alien Program, or 8B, Civilian War Assistance.

A. Enemy Alien Program
Items 8A(1) through 8A(3)

Check the appropriate item indicating the condition primarily responsible for the request. Only one item should be checked.

Cases in which the restrictive action consists of detention or internment of an enemy alien in custody of the Immigration and Naturalization Service of the Department of Justice are to be regarded for purposes of this report as Immigration and Naturalization service cases.

Cases in which the restrictive action consisted of removal of a person or family to a war relocation center* are to be regarded as War Relocation Authority cases.

Cases in which the restrictive action was other than detention, internment or removal to a war relocation are to be classified as "other".

In a few instances more than one type of restrictive action may be taken against the same person or family; e.g., an enemy alien may have been removed to a relocation center and later relocated, but was subsequently interned. In such a situation cases should be classified according to the most recent restrictive action.

B. Civilian War Assistance
Items 8B(1) through 8B(9)

Check the appropriate item indicating the condition primarily responsible for the request. Only one item should be checked.

*A few persons were released directly from assembly centers without going to relocation centers. For purposes of this report such persons, if given assistance or service, are to be shown as War Relocation Authority cases.

Cases checked in item B(7), Civilians Evacuated from Pacific Area Other Than Hawaii, should be reported in the Monthly Statistical Report on Civilian War Assistance (Form WS-6), under item 4b(3), Evacuation under plan of Federal Government, Other. Write in "Evacuated from Pacific area other than Hawaii."

Item 9. Disposition

Check item 9a if the case is approved for assistance and/or service.

Check item 9b if the request or referral is rejected because of ineligibility or otherwise disposed of. Give the facts supporting the decision, using item 13, Remarks, if necessary.

For Civilian War Assistance, also check item 9b for requests disposed of through the provision of information only or through the provision of services completed during the course of the initial interview. (Under the Enemy Alien program, inquiries that are disposed of merely by providing information are not considered requests for services and therefore are not reported at all.)

Under the Enemy Alien program, citizens of enemy countries in need for reasons other than restrictive action of the Federal Government are not eligible for service or assistance, and requests by, and referrals of such persons should therefore be classified in item 9b, even though the county may make provision for certifying such persons to receive assistance from protective powers.

Item 10. Referral (if any) to U. S. Public Health Service

Enter the date of referral of any member of the family to the Public Health Service. Give name of individual referred and reason in item 13, Remarks.

Item 11. Persons in Case. In this item enter the information specified for all persons living in the household at the time of the initial interview. In column A enter the present head of the household first. Enter in column B the relationship of each member of the household to the head. In column C enter date of birth expressed numerically; e.g., 5/27/42.

In column D enter occupational data regarding the head of the household and other employable persons. Give both the occupation and industry, as "salesman, department store," "painter, toy factory." For those who are unemployable, enter "unemployable."

Enter in Column E any remarks particularly applicable to the individual. For example, if the preceding column indicates that an adult is unemployable, some explanation, such as "paralyzed, blind, chronic illness, etc." may be the appropriate entry for this column.

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Columns F, G, and H are to be filled out only for cases accepted under the Enemy Alien Program.

In column F enter country of birth. Observe European boundaries as they existed prior to the present war and the annexations that immediately preceded it.

In column G enter the country of citizenship for each member of the household. For United States citizens of Japanese ancestry, enter "U.S. - Japanese ancestry".

In column H enter the alien registration number of each alien member. This information can be obtained from the Certificate of Identification.

- Item 12. Detained or Interned Members of Family Group. This section is to be filled out only for cases accepted under the Enemy Alien Program and is to be used for recording the location and other pertinent data regarding members of the family who have been detained or interned. If any members of the household were detained and released or paroled prior to the initial interview, they should be entered in item 11 and also in this section. If no members of the household have been detained or interned, enter "None" in this section. The names of the persons affected should be entered in column A.
- Item 13. Remarks. This section should contain any explanation of preceding items which may be necessary. It may also be used to convey supplementary information in instances in which a case is referred to another agency.

1. The first of these is the fact that the

2. The second of these is the fact that the

3. The third of these is the fact that the

4. The fourth of these is the fact that the

5. The fifth of these is the fact that the

6. The sixth of these is the fact that the

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Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento 14
November 15, 1944

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Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

IN REPLY PLEASE REFER
TO:

Dear Mr. Jordan:

Attached are three copies of regulations,
currently effective, made by the State Department
of Social Welfare.

These regulations are filed in accordance with
Article 21 of Chapter 3 of Title 1 of Part 3 of
the Political Code as amended by Chapter 628,
Statutes of 1941.

Very sincerely yours,

C. M. Wollenberg
CHARLES M. WOLLENBERG, Director
Department of Social Welfare

NOV 16 AM 11 03

Encl.
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Rec'd 11-16-44
C. Board

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Department of Social Welfare

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento
November 15, 1944

FILED
In the office of the Secretary of State
of the State of California

NOV 16 1944

FRANK M. JORDAN, Secretary of State

By *Chas. J. Hayes*
Deputy

1297

MANUAL LETTER NO. 66

The attached manual revisions are to be entered in your copy of the Manual of Policies and Procedures and the revision numbers cancelled on the separators for the revised chapters. Revision numbers are listed for the six chapters as follows:

Age	Revision 10
Income	Revisions 23 thru 25
Institution Inmates	Revision 30
Investigation and Decision	Revision 35
Fair Hearing	Revisions 7 thru 10
Financial Procedures	Revisions 81 thru 85

These revisions were approved by the Social Welfare Board on October 26, 1944.

In conformity with a recent opinion of the Attorney General, Sec. 162-05, Eligibility of Public Institution Inmates, has been revised to provide for the eligibility of OAS, ANB, and APSB applicants who are on parole from prison.

Several changes have been made in the Fair Hearings chapter. Sec. 325-40, Investigation of Appeal and Preparation of Brief, has been supplemented to emphasize the need for carrying out the appeal process as expeditiously as possible. It sets a 90-day goal as the time limit from the date the appellant signs the appeal petition to the date of the fair hearing before the SSWB. Sec. 325-50, Appeal Hearing--Time, Place and Attendance, has been revised to assure the appellant or authorized representative the privilege of presenting such evidence, documents, or witnesses as he deems necessary at the fair hearing before the SSWB. Sec. 325-55, Right to Inspect Evidence and Refute Statements, provides that corrections to the brief or new facts shall be filed with the other party to the appeal and the SDSW in order that each party to the appeal may have an opportunity to reply at the time of the hearing. It further provides that if allegedly new facts are submitted by the appellant or the county at the time of the hearing and one or the other party is absent the absent party to the appeal shall be furnished with a certified copy of the alleged facts and be given an opportunity to refute them before a decision is rendered by the SSWB.

New Sec. 107-51, Delayed Birth Certificates Secured Through Court Action or Local or State Registrar, describes several methods by which delayed or corrected birth certificates are secured. This new section replaces Sec. 107-50, Birth Date Established by Court Action.

New Sec. 230-42, CCC Enrollment Records, incorporates into the Manual material formerly in Circular Letter 275 and describes the informational service given by the SDSW concerning former CCC enrollees.

New Sec. 230-44, Single Men's Camp Records, incorporates into the Manual material formerly in Circular Letter 275 and describes the informational service given by the SDSW concerning men who had received care in Single Men's Camps.

Secs. 611-50, Beginning Date of Aid--New Applications, and 611-70, Retroactive Initial Payments, now include policy previously appearing in bulletin form in relation to the beginning date of aid and the amount of retroactive aid payments when the investigation has not been completed within the time limit established in the code for the particular category of aid.

Issuance of these Manual sections renders obsolete the following bulletins:

Bulletins 211 and 216

*STATEMENTS CONTAINED IN THE MANUAL TAKE PRECEDENCE
OVER SAME MATERIAL PREVIOUSLY RELEASED IN BULLETINS*

107-51 DELAYED BIRTH CERTIFICATES SECURED THROUGH COURT ACTION OR
LOCAL OR STATE REGISTRAR
OAS, ANB, APSB, ANC

107-51

Due to the need of many persons for birth certificates for employment or other purposes, provision has been made in California law for securing delayed or corrected birth certificates. These methods are described as follows:

1. Proceedings to Establish Record of Birth Through Petition to Superior Court

For a person born in California or outside of the State, the person himself, or any beneficially interested person, may file a petition and facts with the Superior Court for establishment of the time and place of birth. Following a hearing the court may make an order determining that the birth did in fact occur at the time and place shown by the proofs adduced at the hearing. The order of the court is made upon the form prescribed by the State Registrar of Vital Statistics, and is effective upon filing a certified copy of the form with the local registrar or county recorder and with the State Registrar. The filing fee for the petition is \$3.00. (HEALTH AND SAFETY CODE SECS. 10600 THRU 10607)

2. Registration of Previously Unregistered Birth through State Registrar of Vital Statistics

For a person born in California the person himself, or any beneficially interested person, may file an application for the original registration of such birth with the State Registrar of Vital Statistics or local registrar of the district in which the birth occurred. After review of the application, affidavits, and documentary evidence, the Registrar issues and files a delayed certificate of such birth. The filing fee for the application is \$4.00. (HEALTH AND SAFETY CODE, SECS. 10615 THRU 10620)

3. Correction of Birth Certificates

Whenever the facts are not correctly stated in any certificate of birth and a correction is desired an affidavit is required to be made by the person asserting that the error exists. The affidavit to be filed with the local registrar must state the changes necessary to make the record correct and be supported by the affidavit of one other credible person having knowledge of the facts. (HEALTH AND SAFETY CODE SECS. 19575 THRU 19579)

Since delayed birth certificates are a record made after the event, they should be evaluated as any other piece of age evidence in accordance with the provisions of Sec. 230-45, Evaluation of Evidence. (SEE SEC. 107-10, CONFLICTING EVIDENCE: OF AGE.) (W&IC 1560, 2140, 3075, 3460)

107-40 (Continued)

107-40

TABLE II. BEGINNING DATE OF BIRTH AND DEATH RECORDS FOR EACH STATE*

NAME OF STATE	YEAR	
	DEATHS	BIRTHS
ALABAMA	1908	1908
ARIZONA	1909	1909
ARKANSAS	1914	1914
CALIFORNIA	1905	1905
COLORADO	1907	1907
CONNECTICUT	1897	1897
DELAWARE	1881	1881
DISTRICT OF COLUMBIA	1855	1871
FLORIDA	1877	1865
GEORGIA	1919	1919
IDAHO	1911	1911
ILLINOIS	1916	1916
INDIANA	1900	1907
IOWA	1880	1880
KANSAS	1911	1911
KENTUCKY	1911	1911
LOUISIANA	1889	1870
MAINE	1892	1892
MARYLAND	1898	1898
MASSACHUSETTS	1850	1850
MICHIGAN	1867	1867
MINNESOTA	1900	1900
MISSISSIPPI	1912	1912
MISSOURI	1910	1910
MONTANA	1907	1907
NEBRASKA	1905	1905
NEVADA	1911	1911
NEW HAMPSHIRE	1881	1881
NEW JERSEY	1848	1848
NEW MEXICO	1919	1919
NEW YORK	1880	1880
NORTH CAROLINA	1914	1914
NORTH DAKOTA	1908	1908
OHIO	1909	1909
OKLAHOMA	1917	1917
OREGON	1903	1903
PENNSYLVANIA	1906	1906
RHODE ISLAND	1852	1852
SOUTH CAROLINA	1915	1915
SOUTH DAKOTA	1905	1905
TENNESSEE	1914	1914
TEXAS	1903	1903
UTAH	1905	1905
VERMONT	1857	1857
VIRGINIA	1912	1912
WASHINGTON	1907	1907
WEST VIRGINIA	1917	1917
WISCONSIN	1850	1840
WYOMING	1909	1909

*RECORDS ARE ON FILE FOR THE ENTIRE STATE FROM THE DATE GIVEN.

(U. S. BUREAU OF CENSUS)

107-60 CHURCH RECORDS AS AGE EVIDENCE
OAS, ANB, APSB, ANC**107-60**

Other church records may contain information regarding the age of the applicant; e.g., confirmation, membership or marriage records. Confirmation records are kept by some churches, notably the Catholic, Lutheran and Jewish.

Some of the long established denominations have church membership records extending back for many years. A statement should be secured from the church record, on the letterhead of the church organization. It should be signed by the clergyman or the clerk having charge of the church records, or it should bear the church seal. The statement should contain the following:

1. Name of person.
2. Source of record.
3. Date of record.
4. Age of person as given on record.

(W&IC 1560, 2140, 3075, 3460)

107-55 BAPTISMAL RECORDS AS AGE EVIDENCE
OAS, ANB, APSB, ANC**107-55**

An original or certified copy of a baptismal record is acceptable proof of age. A statement secured from the church record must show:

1. The name of the person baptized,
2. The date of the baptism.
3. The age of the person at date of baptism, or the date of the birth of the person. In ANC, the exact date of birth must appear on the baptismal certificate.
4. The source and date of the record.

Such a statement must be on the letterhead of the church organization, or bear the church seal. It must be signed by the clergyman or the clerk having charge of the church records.

An affidavit signed by the clergyman or other church official is satisfactory when the items listed above are included.

A "Blessing Certificate" from a church of the Latter Day Saints (Mormon) is satisfactory if the above information is included in it.

Baptismal records have no greater value than other church records of recent date if baptism took place during adulthood. Baptismal certificates in ANC should be one or two years old if possible. Supporting evidence to further substantiate the baptismal record should be in the county record if older children are baptized immediately prior to application for aid. (W&IC 1560, 2140, 2162, 3075, 3460)

150-00 (Continued)

150-00

OLD AGE SECURITY	AID TO NEEDY BLIND AID TO PARTIALLY SELF-SUPPORT- ING BLIND RESIDENTS	AID TO NEEDY CHILDREN
<p>PREMIUMS PAID ON INSURANCE POLICIES SHALL NOT BE DEEMED INCOME OR RESOURCES OF THE APPLICANT OR RECIPIENT, WHETHER OR NOT THE PERSON BY WHOM THE PREMIUMS ARE PAID IS A RESPONSIBLE RELATIVE AND NO DEDUCTION THEREFOR SHALL BE MADE FROM THE AMOUNT OF AID GRANTED. (W&IC 2163)</p> <p>WHEN AMENDMENTS TO THE FEDERAL STATUTES OR RULES AND REGULATIONS OF THE FSSB PERMIT, INCOME OR RESOURCES OF THE APPLICANT SHALL NOT BE DEDUCTED FROM THE AMOUNT OF AID TO WHICH THE APPLICANT WOULD OTHERWISE BE ENTITLED. (W&IC 2020.05)</p>	<ol style="list-style-type: none"> 1. INCOME FROM APPLICANT'S LABOR OR SERVICES; 2. THE VALUE OF FOODSTUFFS PRODUCED BY THE APPLICANT OR HIS FAMILY FOR HIS USE OR THAT OF HIS FAMILY; 3. THE VALUE OF FIREWOOD AND/OR WATER PRODUCED ON THE PREMISES OF THE APPLICANT OR GIVEN TO HIM BY ANOTHER FOR THE APPLICANT'S USE; 4. THE VALUE OF GIFTS OTHER THAN REGULAR CONTRIBUTIONS BY RELATIVES LEGALLY RESPONSIBLE UNDER THIS ACT; 5. THE VALUE OF THE USE AND OCCUPANCY OF PREMISES OWNED AND OCCUPIED BY THE APPLICANT; 6. THE NET INCOME FROM REAL AND PERSONAL PROPERTY OWNED BY THE APPLICANT. <p>INCOME IN ADDITION TO THE ABOVE SPECIFIED SHALL BE COMPUTED ON THE BASIS OF NET INCOME. (W&IC 3472)</p> <p>FREE BOARD AND LODGING SUPPLIED TO AN APPLICANT FOR ANB OR APSB BECAUSE OF HIS NECESSITY THEREFOR, BY A FRIEND OR RELATIVE WHO IS NOT RESPONSIBLE FOR HIS SUPPORT OR WHO IS FINANCIALLY UNABLE TO SUPPORT HIM, SHALL NOT BE A GROUND FOR REFUSING AID. (W&IC 3049, 3449)</p>	

150-00 PROVISIONS, W. & I. CODE REGARDING INCOME

150-00

OLD AGE SECURITY	AID TO NEEDY BLIND AID TO PARTIALLY SELF-SUPPORT- ING BLIND RESIDENTS	AID TO NEEDY CHILDREN
<p>THE AMOUNT OF AID TO WHICH ANY APPLICANT SHALL BE ENTITLED SHALL BE, WHEN ADDED TO THE INCOME (INCLUDING THE VALUE OF CURRENTLY USED RESOURCES, BUT EXCEPTING CASUAL INCOME AND INCONSEQUENTIAL RESOURCES) OF THE APPLICANT FROM ALL OTHER SOURCES, FIFTY DOLLARS (\$50) PER MONTH. WHEN THE ACTUAL NEED OF AN APPLICANT EXCEEDS FIFTY DOLLARS (\$50) PER MONTH, SUCH APPLICANT SHALL BE ENTITLED TO RECEIVE AID IN AN AMOUNT (NOT TO EXCEED FIFTY DOLLARS (\$50) PER MONTH) WHICH WHEN ADDED TO HIS INCOME (INCLUDING THE VALUE OF CURRENTLY USED RESOURCES, BUT EXCEPTING CASUAL INCOME AND INCONSEQUENTIAL RESOURCES) FROM ALL OTHER SOURCES, SHALL EQUAL HIS ACTUAL NEED. (W&IC 2020.01)</p> <p>AID SHALL BE GRANTED TO ANY PERSON OTHERWISE ELIGIBLE WHO IS NOT RECEIVING ADEQUATE SUPPORT FROM A HUSBAND OR WIFE, OR CHILD ABLE AND RESPONSIBLE UNDER THE LAWS OF THIS STATE TO FURNISH SUCH SUPPORT. FREE BOARD AND LODGING SUPPLIED TO AN APPLICANT, BECAUSE OF HIS NECESSITY, BY A FRIEND OR RELATIVE WHO IS NOT RESPONSIBLE FOR HIS SUPPORT, SHALL NOT BE GROUND FOR REFUSING AID. (W&IC 2160)</p>	<p>THE AMOUNT OF AID TO WHICH AN APPLICANT FOR ANB SHALL BE ENTITLED, SHALL BE WHEN ADDED TO THE INCOME (INCLUDING THE VALUE OF CURRENTLY USED RESOURCES, BUT EXCEPTING CASUAL AND INCONSEQUENTIAL RESOURCES) OF THE APPLICANT FROM ALL OTHER SOURCES, FIFTY DOLLARS (\$50) PER MONTH. WHEN THE ACTUAL NEED OF AN APPLICANT EXCEEDS FIFTY DOLLARS (\$50) PER MONTH, SUCH APPLICANT SHALL BE ENTITLED TO RECEIVE AID IN AN AMOUNT, NOT TO EXCEED FIFTY DOLLARS (\$50) PER MONTH, WHICH WHEN ADDED TO HIS INCOME (INCLUDING THE VALUE OF CURRENTLY USED RESOURCES, BUT EXCEPTING CASUAL INCOME AND INCONSEQUENTIAL RESOURCES) FROM ALL OTHER SOURCES, SHALL EQUAL HIS ACTUAL NEED. (W&IC 3084)</p> <p>THE AMOUNT OF AID TO WHICH ANY APPLICANT FOR APSB SHALL BE ENTITLED SHALL BE, WHEN ADDED TO THE NET INCOME OF THE APPLICANT FROM ALL OTHER SOURCES, FIFTY DOLLARS (\$50) PER MONTH. NET INCOME FROM ANY OF THE FOLLOWING SOURCES OF A COMBINED TOTAL VALUE NOT EXCEEDING FOUR HUNDRED DOLLARS (\$400) PER ANNUM SHALL NOT BE CONSIDERED FOR ANY PURPOSE:</p>	<p>NO CHILD FOR WHOSE SPECIFIC SUPPORT \$25 PER MONTH IS PAID, OTHER THAN UNDER THE PROVISIONS OF THE ANC LAW, IS A NEEDY CHILD WITHIN THE MEANING OF THE ANC LAW. (W&IC 1523)</p>

(Section Continued on Next Page)

**150-20 PROVISIONS OF W. & I. CODE REGARDING INCOME IN ANB, APSB
ANB, APSB****150-20**

The amount of aid to which any applicant for ANB shall be entitled, shall be when added to the income (including the value of currently used resources, but excepting casual income and inconsequential resources) of the applicant from all other sources, fifty dollars (\$50) per month. When the actual need of an applicant exceeds fifty dollars (\$50) per month, such applicant shall be entitled to receive aid in an amount, not to exceed fifty dollars (\$50) per month, which when added to his income (including the value of currently used resources, but excepting casual income and inconsequential resources) from all other sources, shall equal his actual need. (W&IC 3084)

The amount of aid to which any applicant for APSB shall be entitled shall be, when added to the net income of the applicant from all other sources, fifty dollars (\$50) per month. Net income from any of the following sources of a combined total value not exceeding four hundred dollars (\$400) per annum shall not be considered for any purpose:

1. Income from applicant's labor or services;
2. The value of food stuffs produced by the applicant or his family for his use or that of his family;
3. The value of firewood and/or water produced on the premises of the applicant or given to him by another for the applicant's use;
4. The value of gifts other than regular contributions by relatives legally responsible under this act;
5. The value of the use and occupancy of premises owned and occupied by the applicant;
6. The net income from real and personal property owned by the applicant.

Income in addition to the above specified shall be computed on the basis of net income. (W&IC 3472)

Free board and lodging supplied to an applicant because of his necessity therefor, by a friend or relative who is not responsible for his support or who is financially unable to support him, shall not be a ground for refusing aid. (W&IC 3049, 3449)

**150-30 PROVISIONS OF W. & I. CODE REGARDING INCOME IN ANC
ANC****150-30**

No child for whose specific support \$25 per month is paid, other than under the provisions of the ANC Law, is a needy child within the meaning of the ANC Law. (W&IC 1523)

150-10 PROVISIONS OF W. & I. CODE REGARDING INCOME IN OAS
OAS

150-10

The amount of aid to which any applicant shall be entitled shall be, when added to the income (including the value of currently used resources, but excepting casual income and inconsequential resources) of the applicant from all other sources, fifty dollars (\$50) per month. When the actual need of an applicant exceeds fifty dollars (\$50) per month, such applicant shall be entitled to receive aid in an amount (not to exceed fifty dollars (\$50) per month) which when added to his income (including the value of currently used resources, but excepting casual income and inconsequential resources) from all other sources, shall equal his actual need. (W&IC 2020.01)

Aid shall be granted to any person otherwise eligible who is not receiving adequate support from a husband or wife, or child able and responsible under the laws of this State to furnish such support. Free board and lodging supplied to an applicant, because of his necessity, by a friend or relative who is not responsible for his support, shall not be ground for refusing aid. (W&IC 2160)

Premiums paid on insurance policies shall not be deemed income or resources of the applicant or recipient, whether or not the person by whom the premiums are paid is a responsible relative and no deduction therefor shall be made from the amount of aid granted. (W&IC 2163)

When amendments to the Federal statutes or rules and regulations of the FSSB permit, income or resources of the applicant shall not be deducted from the amount of aid to which the applicant would otherwise be entitled. (W&IC 2020.05)

**163-00 ELIGIBILITY OF INMATES OF NONPROFIT, FRATERNAL AND
BENEVOLENT INSTITUTIONS****163-00****OAS, ANB, APSB**

Aid shall be granted to any person, otherwise eligible, who is an inmate of a home or institution maintained by any fraternal, benevolent or nonprofit organization provided all the following conditions are met:

1. There is no contract obligating the home or institution to care for the inmate for life. (SEE SEC. 163-60, LIFE-CARE CONTRACTS IN NONPROFIT, FRATERNAL AND BENEVOLENT INSTITUTIONS.) (W&IC 3044.5, 3460)
2. In OAS, the home or institution has a written license or permit from the SDSW or from an inspection service approved or accredited by the SDSW in accord with Sec. 2300 of the W&IC and such license has not been revoked. (W&IC 2160.5)
3. In ANB and APSB, the per capita cost of maintenance within the home or institution does not exceed the sum of \$83.33 per month. Per capita cost is not a factor in determining eligibility for OAS except as provided in Sec. 143-30, Inmate's Interest Resulting from Assignment of Property to Nonprofit Institution. (W&IC 3044.5, 3460)
4. The inmate is either obligated to pay the institution for the support provided, or the value of the support given without charge to the inmate is such that his full need is not met. Whether or not the institution has made a bona fide request for payment of the support given shall be ascertained. When full support is not furnished by the institution and the inmate is otherwise eligible, aid shall be granted in an amount necessary to cover the portion of his care not furnished by the institution. (W&IC 3075, 3460; AGO NS5220)

**162-00 INELIGIBILITY OF PUBLIC INSTITUTION INMATES
ANC****162-00**

Aid shall not be granted for a child cared for in a Federal, State or county institution or school. Exception: Aid may be granted under certain circumstances to a child in a county hospital. (SEE SEC. 164-10, ELIGIBILITY DURING HOSPITALIZATION)

Aid shall be discontinued effective as of the last day of the month in which the child for whom aid is received entered the public institution.

When aid is discontinued due to the confinement of such child in any public institution, the county may provide that aid be restored when the child ceases to be an inmate of the institution. Upon release of the child, aid may be granted for the balance of the month during which time the child was not an inmate provided the child is otherwise eligible. (W&IC 1529, 1560)

**162-05 ELIGIBILITY OF PUBLIC INSTITUTION INMATES AND PAROLEES
OAS, ANB, APSB****162-05**

An inmate of a public institution may apply for aid and, if otherwise eligible, aid shall be granted. The applicant may remain in the institution until he receives his first warrant at which time he shall cease to be an inmate. (W&IC 2160E, 3044, 3444)

The warrant delivered upon the person's release from the institution shall be in the full monthly amount, provided the application was signed on or prior to the first day of the month in which aid was granted. (SEE SECS. 610-60, PAYMENT TO INMATE OF PUBLIC INSTITUTION, AND 610-70, CERTIFICATION OF PAYMENT AFTER RELEASE OF INMATE FROM INSTITUTION.) (W&IC 2140, 2160E, 2183, 3044, 3075, 3084, 3444, 3460)

A person may apply for and receive aid while on parole from a State Hospital. (SEE SEC. 124-35, RESIDENCE WHILE ON PAROLE) (AGO NS858, NS3293)

A person confined in a public correctional institution is not eligible to receive aid and aid shall be discontinued as of the last day of the month in which a recipient enters a public correctional institution. Upon release, aid may be restored for the balance of the month during which he was not confined in a public correctional institution, provided he is otherwise eligible. (W&IC 2140, 2160E, 3044, 3075, 3444, 3460)

Aid shall be granted to a person on parole from a prison if he is otherwise eligible. (AGO NS5624)

An inmate of a veterans hospital or home may apply for ANB or APSB. (W&IC 3044, 3044.5, 3075, 3444, 3460; AGO NS572)

230-42 (Continued)

230-42

Federal CCC Headquarters Records--Ninth Service Command
Fort Douglas
Salt Lake City, Utah

These records contain information pertinent to enrollee while he was a member of CCC including:

Enrollment and discharge documents and records
Medical and work records while a member
Transcripts of any trials or appeals
(All information pertaining to the enrollee while he was a member of CCC)

The SDSW will give any information contained in the State Index to responsible agencies upon their request. All requests for information from any source should be as complete as possible - including the full name and address, county and the CCC serial number. (W&IC 1560, 2140, 3075, 3460)

280-44 SINGLE MEN'S CAMP RECORDS
OAS, ANB, APSB, ANC

230-44

From 1933 to July 1, 1941, camps for transient and State homeless men were operated by the State Relief Administration as part of its program of unemployment relief. The SDSW has in its possession the residence and medical records of those men who received care in the Single Men's Camps under the administration of the State Relief Administration.

These records consist of cards containing identifying information such as date and place of birth, physical description, and information relating to the social security number, residence, citizenship, marital status, veteran's status, and occupation is usually included. The records are not case records in the sense of including the date the man was sent to the camp and his length of stay, his social or employment history, the address from which he was sent to the camp, etc., but these may be of assistance, if the local case records, which were, in general, more complete, are not available.

The SDSW will answer inquiries from responsible agencies and will send photostatic copies of pertinent records. (W&IC 1560, 2140, 3075, 3460)

230-40 SOCIAL SERVICE EXCHANGE
OAS, ANB, APSB, ANC**280-40**

Clearance through a confidential index or social service exchange enables the county to determine the social agencies to which the applicant may have been known or is known. Clearance, when possible, should be made after identifying data have been obtained from the applicant and before the first interview with him. (SEE GLOSSARY, SOCIAL SERVICE EXCHANGE.)

Case records of social agencies may contain facts or substantial information pertinent to the applicant's eligibility for aid covering points such as age, residence, property, income, employment history, health, paternity, missing relatives, resources, etc. One agency's records may indicate other social agencies or organizations which have information concerning applicant. (W&IC 1560, 2140, 3075, 3460)

230-42 CCC ENROLLMENT RECORDS
OAS, ANB, APSB, ANC**230-42**

The Civilian Conservation Corps (CCC) was an agency created April 5, 1933, to provide work for single, unemployed boys between the ages of 17 and 28 years. Veterans and Indians were admitted to the Corps regardless of age. On June 30, 1942, the agency discontinued its operations.

Information concerning CCC enrollees is contained in the following three sets of records:

State Index--at the State Department of Social Welfare
616 K Street, Sacramento 14

This index contains selection, enrollment, and discharge information as follows:

Name and address at time of enrollment

Enrolling county

Dates of enrollment and discharge

Types of discharge

CCC serial number

County Records--in the county files

Case history including family records

Evidence of eligibility under CCC requirements

Copies of enrollment and discharge documents

(Section Continued on Next Page)

230-45 (Continued)

230-45

All information offered as evidence should be examined from the point of view of internal consistency; i.e., does the evidence agree within itself? Inconsistency may indicate that further clarification is necessary either through further discussion with reference or through use of other sources. Evidence should likewise be evaluated from the point of view of information previously secured and, at the time of final decision, in the light of all available data.

In selecting sources of information to establish eligibility or in attempting to resolve conflicting information, the following suggestions may be of assistance:

1. The weight assigned to any statement, whatever its source, must be appraised with respect to any possible motive the person making the statement may have had for varying the facts; e.g., applicants for life insurance or older persons seeking work may have motives for understating age. Young applicants for employment, marriage licenses, or other licenses may overstate age. Every statement, whether contained in a document or not, must be considered in relation to the purpose for which it was made or to possible motives of the informant.
2. The most reliable record is usually that which was made for the purpose of maintaining archives or registers. This is the basis of the importance of vital statistics, census enumeration, Bible entries, and even family correspondence. Such records may have been conditioned by motives or the data sought in them may have been reported casually on the basis of observation rather than fact, as in the case of census entries. Where, however, the record was made when the event occurred and the written statement was intended as a family genealogy or official register, such a record is usually valid.

(Section Continued on Next Page)

230-45 EVALUATION OF EVIDENCE
OAS, ANB, APSB, ANC**230-45**

Information secured in the process of investigation will have little worth unless it is evaluated, correlated, and interpreted in relation to eligibility. A systematic examination of the possible sources of information will result in a saving of time and energy by determining where the most reliable information can be secured in the shortest period of time. The best evidence available should be used.

The definition of legal evidence set forth in the Glossary may assist in evaluating information, but the presence of social evidence should not be overlooked in making the decision. Original, positive, direct, or primary evidence shall be used when available. The facts in each investigation will determine when information adequate to establish eligibility has been secured. When evidence obtained points to a given conclusion but is not sufficient to establish it, further evidence shall be secured.

Investigation should be directed toward the accumulation of factual information. The worker who keeps in mind that the information secured in the investigation is for the benefit of the applicant (or children on whose behalf the application has been made) as well as the county will be less likely to mistake opinions or rumors for facts.

When there is conflict between the applicant's sworn statement and competent evidence, decision shall rest upon the facts established by the evidence. (SEE SEC. 107-10, CONFLICTING EVIDENCE OF AGE.) A conflict in information from two apparently equally reliable sources usually means that not all facts have been discovered and further inquiry is indicated until reasonable doubt is resolved. When conflicting evidence cannot be reconciled, the data substantiated by a preponderance of evidence should be used. In determining preponderance of evidence consideration should be given to the relative merit of the various pieces of evidence to determine that evidence which has greater validity. When information given by various references comes from the same source, such evidence can be considered as only one item of evidence.

Evaluation of the source of information is essential. In making such an evaluation, the following questions may be considered: What is the source of the reference's information? Is it based on first-hand observation or hearsay? What is the bias or self-interest of the person? Would his motives affect his reliability as a reference?

(Section Continued on Next Page)

**325-40 INVESTIGATION OF APPEAL AND PREPARATION OF BRIEF
OAS, ANB, APSB, ANC****325-40**

After an appeal has been filed, a representative of the SDSW conducts a complete, impartial investigation. The county's position in the matter is obtained through a discussion and a review of the case record. The appellant's situation and contention is determined by an interview with him. Points of eligibility on which there is no disagreement between the appellant and the county are noted for inclusion in the brief but the county's prior investigation, if adequate, is not duplicated.

The point or points on which there is disagreement or a difference in interpretation between the parties concerned are investigated thoroughly, starting with the information already verified and proceeding further in order to verify, if possible, the contentions of the appellant and/or the county. The purpose of the investigation is to secure for the consideration of the SSWB all available information and evidence in the case with particular emphasis on the point or points on which there is disagreement.

A brief of the findings secured through all sources is then prepared for presentation to the SSWB. The brief contains a resume of the facts agreed to by both parties; a statement (in writing and signed, if possible) of each party's contention on the point or points at issue; all pertinent facts discovered in the investigation; citations from the law, Attorney General's Opinions, and the SDSW rules and regulations pertaining to the point at issue.

There are three exceptions to the above procedure:

1. In an appeal on the degree of blindness, only medical evidence on that point is presented.
2. In an appeal when the county refuses to accept an application the evidence presented covers:
 - (a) Appellant's attempt to apply for aid;
 - (b) The county's refusal to receive application with reason for such refusal;
 - (c) The point or points of eligibility concerned.
3. In appeals for retroactive aid when there is no disagreement but the appellant, the county, and the SDSW all stipulate as to the facts, only such stipulations are presented together with the county recommendation regarding the amount of retroactive aid.

Investigation of the appeal and preparation of the brief should be carried out as expeditiously as possible. Not more than 90 days should elapse between the date the appellant files a petition for a fair hearing and the date of the fair hearing before the SSWB. (WAC 1560, 2140, 3075, 3460)

325-25 FAIR HEARING--DEFINITION
OAS, ANB, APSB, ANC**325-25**

The fair hearing is the proceeding in which the SSWB hears and weighs all evidence and arguments concerning the point at issue and any other pertinent information presented by the parties concerned and the independent SDSW investigation. (W&IC 1551, 1560, 2140, 3075, 3460)

325-35 COMPLAINTS
OAS, ANB, APSB, ANC**325-35**

A complaint expressed by letter or in person to the SDSW is usually the first indication of dissatisfaction by an applicant for or a recipient of aid. A complaint may originate from a lack of knowledge or a misunderstanding of the provisions of the law. It may arise from disagreement regarding points of eligibility or it may represent dissatisfaction with the county's action or inaction. Dissatisfaction resulting in a complaint may arise over (1) denial of application, (2) delay in approval of application, (3) beginning date of aid, (4) amount of the grant, (5) determination of chapter under which aid (ANB or APSB) is granted, (6) discontinuance, or (7) any other matter which concerns an application for aid.

The SDSW may adjust a complaint through interpretation of the situation to the complainant on the basis of the law, or rules and regulations. An adjustment may be made by the county after further discussion with the complainant or consultation with SDSW representative. If the complainant remains dissatisfied, his complaint then becomes an appeal. (W&IC 1560, 2140, 3075, 3460)

325-50 APPEAL HEARING --TIME, PLACE AND ATTENDANCE
OAS, ANB, APSB, ANC

325-50

Appeals are heard at the regular monthly meetings of the SSWB. Such meetings are held in various major cities for the convenience of persons who desire to appear before the SSWB. The number of appeals and their urgency in any particular locality may be called to the attention of the SSWB for the determination of the date and place of a meeting.

The appeal is heard by the SSWB only when both appellant and county have been duly notified. Notices of date and place of the hearing are mailed by the SDSW to the chairman of the county board of supervisors, the county welfare department and the appellant, by registered mail (return receipt requested) in time to be received ten days prior to the hearing. With the notification to appellant and county welfare department is sent a copy of the appeal brief as prepared for the SSWB. The appellant is also advised of date and place of the next regular monthly SSWB meeting so that he may request a postponement if his attendance at a subsequent meeting can be more conveniently arranged.

Action upon an appeal may be taken only when four of the seven members of the SSWB (a quorum) are present. The appellant may appear in person, with or without counsel, or may be represented by counsel or by an authorized representative. The appellant or authorized representative may present such evidence, documents, witnesses, or such other assistance as he deems necessary. Such presence or representation by the appellant is not required. County representatives may attend if they so desire.

All hearings on appeals are held in open session of the SSWB unless the appellant makes written request for a private hearing prior to the SSWB meeting, or makes such a request at the meeting.

After an appeal hearing is scheduled, an appellant and/or county may, by writing to SDSW, request postponement of the hearing. The SDSW then notifies the other party to the appeal of the request and asks that assent or dissent be indicated in writing. The request for postponement and the reply of other party are presented to the SSWB for appropriate action at the meeting for which the hearing was originally scheduled. (W&IC 1560, 2140, 3075, 3460)

325-42 STIPULATED APPEALS
OAS, ANB, APSB, ANC**325-42**

An appeal for retroactive aid, in which the appellant, the county, and the SDSW all agree as to the facts and recommendations, is called a "stipulated appeal". In such appeals the county may initiate the action on behalf of the recipient (or the child/children in ANC) or join with him in the action.

Investigation of a stipulated appeal by the SDSW consists of (1) a review of the county record; (2) a determination of income during the period involved (this necessitates an interview with the appellant), and (3) a thorough check on the amount of retroactive aid allowable month by month to determine whether the SDSW concurs in the county's recommendation to the SSWB on this point.

The county's recommendation regarding the amount of retroactive aid allowable shall be submitted in writing. Petition for an Appeal (Form Gen M116), or a similar form may be used carrying the signatures of both the appellant and the county representative. (W&IC 1560, 2140, 3075, 3460)

325-45 ADJUSTMENT OR WITHDRAWAL OF APPEAL BEFORE STATE SOCIAL WELFARE
BOARD HEARING
OAS, ANB, APSB, ANC**325-45**

During the course of the SDSW's investigation the county may reconsider its former action and on the basis of additional information or interpretation may make an adjustment satisfactory to the appellant. When the appellant withdraws his appeal in anticipation of county's agreement to make or adjust a grant of aid, the appeal is not considered finally adjusted until the action or change agreed upon is actually effectuated by board of supervisors' action. If the county adjustment is delayed beyond a reasonable period the SDSW may reopen its investigation to determine if basis for the appeal continues to exist.

The appellant may withdraw his request for an appeal because the county agrees to make an adjustment or because he decides not to continue the appeal. The appellant indicates his desire to withdraw the appeal by signing a form devised for that purpose by SDSW (Form Gen M29) or by advising the SDSW in writing. (SEE FORM GEN M29 IN SEC. 330-99)

An appeal which is not withdrawn in writing, may be removed from the docket only by action of the SSWB; i.e.; either by hearing the appeal and rendering a decision or by dismissal. (W&IC 1560, 2140, 3075, 3460)

**325-65 CONTINUATION OF HEARING
OAS, ANB, APSB, ANC****325-65**

The SSWB may order the appeal hearing continued to a subsequent meeting when:

1. Additional legal advice is required;
2. Further investigation is required;
3. The appellant may thereby attend the hearing;
4. The appellant or county request such continuation and the other party concurs;
5. When other reasons in the opinion of the SSWB make continuation desirable. (W&IC 1560, 2140, 3075, 3460)

**325-70 DECISIONS BY THE STATE SOCIAL WELFARE BOARD
OAS, ANB, APSB, ANC****325-70**

After considering the brief which is filed as evidence and hearing all additional testimony and arguments, the SSWB renders a decision either to:

1. Grant the appeal;
2. Sustain the action of the county;
3. Dismiss the appeal (when the SSWB does not have jurisdiction in the matter under appeal, or when anything occurs, between the setting of appeal for hearing and actual hearing, that eliminates need for an appeal).

If the appeal is granted, the SSWB makes a specific grant of aid, indicating the amount and the beginning date of aid, unless it is not possible at the time of the hearing to determine the specific amount because of current changes in the appellant's situation, or, as in appeals from county inaction or from denial on the degree of blindness, because the total situation has not been investigated. In such cases the decision is usually an order to the county to take an application and/or grant aid "in the amount to which the appellant may prove eligible" and the county then determines the specific amount. (W&IC 1551, 1560, 2140, 2182, 3075, 3086, 3460, 3473)

325-55 RIGHT TO INSPECT EVIDENCE AND REFUTE STATEMENTS
OAS, ANB, APSB, ANC**325-55**

Submission by the SDSW of the appeal brief to the appellant and county before the time of the hearing gives them the opportunity to review their case and, as a result of such review, they may correct or refute statements in the brief or may add statements or evidence to further support their case. Any corrections or submission of new facts shall be filed with the other party to the appeal and with the SDSW in order that each party to the appeal may have an opportunity to reply at the time of the hearing. In every case each appellant should have furnished, or have access to, every document used.

Nothing shall preclude the submission of allegedly new facts by either party at the hearing. In the event that such is submitted by the appellant or the county at the time of the hearing in the absence of the other party to the appeal, the absent party shall be furnished with a certified copy of the alleged facts and be given an opportunity to refute them before a decision is rendered by the SSWB. (W&IC 1560, 2140, 3075, 3460)

325-60 HEARING PROCEDURE
OAS, ANB, APSB, ANC**325-60**

In the conduct of the fair hearing, the SSWB is not strictly bound by court rules of evidence. The appeal brief as prepared by the SDSW, and any briefs prepared by the appellant or county are presented at the hearing and filed as evidence. All parties involved in the appeal are permitted to present any additional evidence and call any witnesses they desire. Before testifying all witnesses are placed under oath by the chairman of the SSWB. Frequently the appellant is willing to rest his case on the presentation of facts in the brief and does not testify in person.

The SSWB considers and weighs the evidence presented and renders a decision at the close of the hearing, or takes the appeal under advisement for later decision. (W&IC 1551, 1560, 2140, 3075, 3460)

**325-85 RECORD OF HEARING AND DECISION
OAS, ANB, APSB, ANC****325-85**

A verbatim record is made of each hearing. A copy of this record becomes a permanent part of the appellant's case record in the SDSW.

After the SSWB renders its decision, the facts upon which the decision is based and the final decision are filed with the assistant secretary of the SSWB. Summaries of each hearing and decision are included in the minutes of the meeting which are reviewed and passed upon by the SSWB at the subsequent meeting. (W&IC 1560, 2140, 3075, 3460)

325-75 RETROACTIVE AID
OAS, ANB, APSB, ANC**325-75**

Retroactive aid is granted by the SSWB only on the basis of the appellant's continuing eligibility for aid during the period in question. The amount of the grant shall be determined for the period in accordance with the requirements for the particular category of aid. For other provisions for granting retroactive aid see Sec. 611-70, Retroactive Initial Payments, and Sec. 361-25, Retroactive Aid Payments by County. (W&IC 1551, 1560, 2140, 2182, 3075, 3086, 3460; AGO NS4670)

325-80 NOTIFICATION OF STATE SOCIAL WELFARE BOARD DECISION
OAS, ANB, APSB, ANC**325-80**

Notification of the SSWB decision is sent by mail immediately after the hearing to the appellant, the chairman of the county board of supervisors, the county auditor and the county welfare department. (W&IC 1560, 2140, 3075, 3460)

611-50 (Continued)

611-50

4. Aid shall begin on the date specified by the SSWB in an order awarding aid. (SEE SEC. 325-70, DECISION BY SSWB)

The beginning date of aid shall not antedate the signing of the application. Exception: When the recipient transfers from one county to another, the beginning date of aid in the second county may antedate the signing of the application in the second county. (SEE SEC. 122-67, CONTINUOUS PAYMENT OF AID IN TRANSFERRED CASE.)

If investigation established eligibility only from a date subsequent to the date when aid should be effective under the provisions of W&IC Sec. 2183, or 2183.9 in OAS, Sec. 3082 in ANB, Sec. 3460 in APSB, or Sec. 1550 in ANC, aid shall not be granted prior to the date on which the applicant became eligible as established by the investigation.

When the provisions of W&IC Sec. 2183, or 2183.9 in OAS, Sec. 3082 in ANB, Sec. 3460 in APSB, or Sec. 1550 in ANC, indicate that aid should begin from the first of a month preceding that in which the board of supervisors grants the application, but because of ineligibility of the applicant during one or more of such months, retroactive aid is not paid, a statement of the specific reason for the applicant's ineligibility for such payment shall be made on the Certificate of Eligibility. (W&IC 1550, 1560, 2140, 2183, 2183.9, 3075, 3082, 3460, FSSB)

611-55 BEGINNING DATE OF AID--RESTORATIONS OAS, ANB, APSB, ANC

611-55

Restorations shall be effective as of the first day of the month in which action is taken by the board of supervisors unless the status of eligibility requires that the board of supervisors specify a later date, except in OAS when restoration is requested following discontinuance due to employment. (SEE SEC. 215.-00, RESTORATION OF AID) (W&IC 1550, 1552, 1560, 2140, 2182, 2183.9, 3075, 3084, 3460)

In OAS, whenever a former recipient whose aid was discontinued because of employment requests restoration because the employment has ceased, the request shall be in writing and the signed statement shall include the date on which the employment terminated. (SEE SEC. 230-90, INVESTIGATION OF APPLICATION AFTER DISCONTINUANCE DUE TO EMPLOYMENT) The date on which such request for restoration is signed governs the beginning date of aid (unless the status of eligibility requires the board of supervisors to specify later date), and the effective date of restoration is determined as follows:

(Section Continued on Next Page)

611-50 (Continued)

611-50

When in OAS reapplication is made following discontinuance because of employment (FOR EXCEPTION SEE SEC. 230-90, INVESTIGATION OF APPLICATION AFTER DISCONTINUANCE DUE TO EMPLOYMENT) and the investigation is not completed by action of the board of supervisors within 30 days from the signing of the application and aid is granted on the 31st or some subsequent day, aid shall begin on the first of the month in which the 30-day period ended.

In OAS, the day following that on which the application is signed represents the first day of the investigation period. When the 60th (or 30th) calendar day falls on a Sunday or a legal holiday, the following day is considered the last day of the investigation period. The date on which the board of supervisors acts on the application is the date on which the investigation is completed.

EXAMPLE A: APPLICATION SIGNED JULY 15; GRANTED BY BOARD OF SUPERVISORS SEPTEMBER 15, 60-DAY PERIOD ENDED SEPTEMBER 13. AID IS PAID FROM SEPTEMBER 1 AS THE FIRST OF THE MONTH IN WHICH THE BOARD OF SUPERVISORS GRANTED THE APPLICATION IS EARLIER THAN THE FIRST OF THE MONTH FOLLOWING THE END OF THE 60-DAY PERIOD.

EXAMPLE B: APPLICATION SIGNED JULY 5. THE 60-DAY PERIOD ENDED SEPTEMBER 3. APPLICATION GRANTED BY BOARD OF SUPERVISORS NOVEMBER 8. AID IS PAID FROM OCTOBER 1, AS THE FIRST OF THE MONTH FOLLOWING THE END OF THE 60-DAY PERIOD IS EARLIER THAN THE FIRST OF THE MONTH IN WHICH THE BOARD OF SUPERVISORS GRANTED THE APPLICATION.

EXAMPLE C: REAPPLICATION AFTER DISCONTINUANCE BECAUSE OF EMPLOYMENT IS MADE SEPTEMBER 10 AND THE BOARD OF SUPERVISORS GRANTS THE AID OCTOBER 20. THE 30-DAY PERIOD EXPIRED OCTOBER 10. AID IS PAYABLE FROM OCTOBER 1.

- (b) In ANB, APSB and ANC when the investigation of the application is not completed by action of the board of supervisors within 90 days from the signing of the application and aid is granted on the 91st or some subsequent day, aid shall begin on the first of the month during which the 90-day period ends. (SEE SEC. 611-70)

The day following that on which the application is signed represents the first day of the investigation period. When the 90th calendar day falls on a Sunday or a legal holiday, the following day is considered the 90th day. The date on which the board of supervisors acts on the application is the date on which the investigation is completed.

EXAMPLE A: APPLICATION SIGNED SEPTEMBER 6; GRANTED BY BOARD OF SUPERVISORS FEBRUARY 6. AS THE 90-DAY PERIOD ENDED DECEMBER 5, AID IS PAID FROM DECEMBER 1.

EXAMPLE B: APPLICATION SIGNED SEPTEMBER 6; GRANTED BY BOARD OF SUPERVISORS DECEMBER 10. AS THE 90-DAY PERIOD ENDED DECEMBER 5, AID BEGINS ON DECEMBER 1.

(Section Continued on Next Page)

**611-70 RETROACTIVE INITIAL PAYMENTS
OAS, ANB, APSB, ANC****611-70**

In OAS when the investigation has required more than 60 days on new applications and more than 30 days on restorations after discontinuance due to employment (SEE SEC. 230-90, INVESTIGATION OF APPLICATION AFTER DISCONTINUANCE DUE TO EMPLOYMENT) and in ANB, APSB and ANC when the investigation has required more than 90 days for completion and the payment of retroactive aid is necessary, the payment of such retroactive aid represents the initial payment. Such payment will not be made in the month or months for which the retroactive aid is granted. In such cases, the retroactive payments shall be made in the month of board of supervisors' action granting the application. (SEE SECS. 611-50, BEGINNING DATE OF AID--NEW APPLICATIONS, 611-55, BEGINNING DATE OF AID--RESTORATIONS, AND 627-30, BASIS FOR FEDERAL PARTICIPATION.)

EXAMPLE A: AN ANB, APSB, OR ANC APPLICATION SIGNED AUGUST 5; APPROVED BY BOARD OF SUPERVISORS, THE FOLLOWING JANUARY 10 WITH AID TO BEGIN NOVEMBER 1. NOVEMBER, DECEMBER AND JANUARY PAYMENTS SHALL BE MADE IN JANUARY.

EXAMPLE B: OAS REQUEST FOR RESTORATION AFTER DISCONTINUANCE DUE TO EMPLOYMENT MADE ON FEBRUARY 16; APPROVED BY BOARD OF SUPERVISORS ON APRIL 5 WITH AID TO BEGIN MARCH 1. MARCH AND APRIL PAYMENTS SHALL BE MADE IN APRIL.

The amount of the grant for each month for which retroactive aid is paid shall be the amount to which the applicant (child or children in ANC) is eligible. (SEE SECS. 201-25, WHEN APPLICATION TO BE TAKEN, AND 250-00, DISPOSAL OF APPLICATIONS.)

EXAMPLE C: THE 60-DAY PERIOD EXPIRED SEPTEMBER 27, BUT DETERMINATION OF ELIGIBILITY FOR OAS BY BOARD OF SUPERVISORS ACTION IS NOT UNTIL NOVEMBER 3. AID IS GRANTED EFFECTIVE OCTOBER 1. THE APPLICANT HAS A REGULAR INCOME OF \$25 A MONTH FROM A VETERAN'S PENSION AND \$4 A MONTH VALUE OF OCCUPANCY MAKING A TOTAL INCOME OF \$29 A MONTH. THIS RECIPIENT HAS REQUESTED THAT HIS NEEDS BE DETERMINED ON A BUDGETARY BASIS AND TOTAL NEEDS ARE FOUND TO HAVE BEEN \$67 IN OCTOBER, BUT INCREASED TO \$77 ON NOVEMBER 1. ON NOVEMBER 3, THEREFORE, AID IS GRANTED EFFECTIVE OCTOBER 1, AND THE CERTIFICATE OF ELIGIBILITY SHOWS A TOTAL NEED OF \$67, INCOME \$29. GRANT OF AID \$38. ALSO ON NOVEMBER 3 THE BOARD OF SUPERVISORS ACTS ON A NOTICE OF CHANGE INCREASING AID TO \$48 EFFECTIVE NOVEMBER 1. (TOTAL NEED \$77 LESS INCOME \$29 EQUALS \$48) THE OCTOBER GRANT OF \$38 AND THE NOVEMBER GRANT OF \$48 ARE BOTH DELIVERED IN NOVEMBER.

EXAMPLE D: APPLICATION FOR ANB SIGNED JUNE 8. THE 90-DAY PERIOD TERMINATED SEPTEMBER 6, BUT THE APPLICATION IS NOT GRANTED BY THE BOARD OF SUPERVISORS UNTIL NOVEMBER 8. AID IS GRANTED FROM SEPTEMBER 1, THE FIRST OF THE MONTH IN WHICH THE END OF THE 90-DAY PERIOD OCCURRED. IN SEPTEMBER THE APPLICANT RECEIVED \$15 NET RENTAL INCOME, BUT NO SUBSEQUENT RENTAL WAS RECEIVED DUE TO VACANCY. AS THE APPLICANT DID NOT HAVE EXCESS NEED FOR SEPTEMBER, \$35 IS GRANTED FOR THAT MONTH AND THIS AMOUNT IS REPORTED ON THE CERTIFICATE OF ELIGIBILITY. A NOTICE OF CHANGE INCREASING THE GRANT TO \$50 EFFECTIVE OCTOBER 1, IS ALSO ACTED UPON BY THE BOARD OF SUPERVISORS ON NOVEMBER 8. THE WARRANTS FOR SEPTEMBER, OCTOBER, AND NOVEMBER ARE DELIVERED IN NOVEMBER.

(Section Continued on Next Page)

611-55 (Continued)

611-55

1. Aid shall be restored on the date the request for restoration is signed if the aid is granted by the board of supervisors in the same month in which the request is signed.

EXAMPLE: RESTORATION IS REQUESTED ON MARCH 16; GRANTED BY BOARD OF SUPERVISORS ON MARCH 23.
AID BEGINS MARCH 16.

2. Aid shall be restored on the first day of the month in which aid is granted by the board of supervisors when the request for restoration has been signed in a previous month and 30 days or less have elapsed between the date the request was signed and the date aid is granted by the board of supervisors.

EXAMPLE: RESTORATION IS REQUESTED ON MARCH 16; GRANTED BY BOARD OF SUPERVISORS ON APRIL 15.
AID BEGINS APRIL 1.

3. When investigation of the request for restoration is not completed within 30 days from the signing of the request and aid is granted by the board of supervisors on the 31st or some subsequent day, aid shall be restored on the first day of the month during which the 30-day period ends.

The day following that on which the former recipient requests restoration represents the first day of the investigation period. When the 30th day falls on a Sunday or a legal holiday, the following day is considered the 30th day. The date on which the board of supervisors acts on the request for restoration is the date on which the investigation is completed. (SEE SEC. 611-70, RETROACTIVE INITIAL PAYMENTS)

EXAMPLE: RESTORATION IS REQUESTED ON MARCH 16; GRANTED BY BOARD OF SUPERVISORS ON MAY 5.
THE 30-DAY PERIOD ENDS APRIL 15. RETROACTIVE AID IS PAID FROM APRIL 1.

(W&IC 2140, 2182, 2183.9)

611-60 INITIAL PAYMENTS OAS, ANB, APSB, ANC

611-60

Initial payments are the first payments made on new applications and restorations.

Initial payments of aid shall be made within the month for which such aid is granted except when aid is granted by the SSWB, or when retroactive aid is granted because the investigation is not completed by action of the board of supervisors within 30, 60, or 90 days after application is made. (SEE SECS. 611-50, BEGINNING DATE OF AID--NEW APPLICATIONS 611-55, BEGINNING DATE OF AID--RESTORATIONS, 611-70, RETROACTIVE INITIAL PAYMENTS, AND 361-25, RETROACTIVE AID PAYMENTS BY COUNTY.) The initial payment includes the day on which aid begins. When aid begins on the first day of a month, payment shall be made for the full month. When aid begins during a month, the initial payment shall cover only the portion of the month for which aid is granted including the beginning day. (W&IC 1550, 1560, 2140, 2182, 2183, 2183.9, 3075, 3082, 3084, 3460; FSSB)

611-95 REISSUANCE OF WARRANTS
OAS, ANB, APSB, ANC**611-95**

Whenever a warrant has been canceled upon the expiration of six months from the date of its issuance, a county may, in a proper case, issue a new warrant in the same amount and for the same purpose as the original. If the re-issued warrant is payable to a person other than the grantee there shall be evidence available to indicate that the grantee received the full use and benefit of the grant. (SEE SEC. 628-06, CLAIM FOR WARRANTS ISSUED IN LIEU OF CANCELED WARRANTS)

EXAMPLE: A WARRANT IS DELIVERED TO AN OAS RECIPIENT ON MARCH 1; IS PROPERLY ENDORSED BY THE RECIPIENT AND CASHED BY A GROCER ON MARCH 3; ENDORSED BY GROCER AND GIVEN TO A WHOLESALE HOUSE AS PARTIAL PAYMENT ON ACCOUNT; TRANSMITTED BY THE WHOLESALE HOUSE TO ITS HOME OFFICE IN THE EAST. ON SEPTEMBER 1 THE WARRANT IS STILL OUTSTANDING AND IS CANCELED; FINALLY PRESENTED ON NOVEMBER 2, THROUGH SUBSEQUENT ENDORSERS, TO THE COUNTY TREASURER FOR PAYMENT. A NEW WARRANT IS ISSUED TO THE LAST ENDORSER AND FEDERAL AND STATE REIMBURSEMENT IS AVAILABLE AS THE ORIGINAL WARRANT SHOWS ENDORSEMENT BY THE OAS RECIPIENT.

Whenever a warrant has been lost or destroyed before it has been paid by the county treasurer, the amount due may be recovered by the payee by filing with the county auditor an affidavit setting forth the fact of the loss or destruction of the warrant, together with all material facts relative thereto known to the affiant, the amount, the name of the payee, and the date and number of the warrant if the same are known to the affiant. Upon receipt of the affidavit, and without the filing of any bond by the payee, the county auditor shall issue and deliver to the payee of the original warrant a duplicate warrant for the full amount of the original warrant and the county treasurer shall pay the duplicate warrant in lieu of the original warrant. A warrant shall be considered to have been lost if it has been mailed and has not been received by the addressee within 20 days after the date of mailing. (W&IC 140, 222, 1560, 2140, 3075, 3460)

612-00 FINANCIAL RECORDS FOR INDIVIDUAL CASES
OAS, ANB, APSB, ANC**612-00**

The following procedure is advised:

An individual account should be kept in the county for each recipient of aid. Such a record should include the name of the grantee and/or payee, the State case number, the amount of the grant, the effective date of the grant, all changes in the rates of aid, the effective dates of such changes, the dates of payment, and warrant numbers. All payments should be posted to these accounts. Cancellations, collections, and other adjustments should be recorded.

These records should be filed in numerical sequence by State number. The issuance of warrants and payroll listings should follow the same order to facilitate posting. (W&IC 1560, 2140, 3075, 3460)

611-70 (Continued)

611-70

EXAMPLE E: THE 90-DAY PERIOD TERMINATED OCTOBER 13, BUT THE APPLICATION FOR ANC IS NOT GRANTED UNTIL NOVEMBER 8. AID IS GRANTED FROM OCTOBER 1, THE FIRST DAY OF THE MONTH IN WHICH THE END OF THE 90-DAY PERIOD OCCURRED. IN OCTOBER, THE FAMILY UNIT HAD INCOME FROM THE MOTHER'S EARNINGS IN THE AMOUNT OF \$40, WHICH LEFT A BUDGETARY DEFICIENCY OF \$60. THIS EMPLOYMENT WAS FOR OCTOBER ONLY, AND THE AMOUNT NEEDED TO MEET THE BUDGETARY DEFICIENCY SUBSEQUENT TO OCTOBER WAS \$100. AID FOR OCTOBER WAS GRANTED IN THE AMOUNT OF \$60, AND IS SO REPORTED ON THE CERTIFICATE OF ELIGIBILITY. ON THE SAME DATE THAT THE BOARD OF SUPERVISORS GRANTED AID IN THE AMOUNT OF \$60, EFFECTIVE OCTOBER 1, 1943, A NOTICE OF CHANGE INCREASING AID EFFECTIVE NOVEMBER 1, 1943, IS ACTED UPON. THE NOVEMBER WARRANT FOR \$100, TOGETHER WITH THE OCTOBER WARRANT OF \$60, IS DELIVERED IN NOVEMBER. (W&IC 1550, 1560, 2140, 2183, 2183.9, 3075, 3082, 3460)

**611-80 PAYMENTS MADE UPON ORDER OF THE SSWB
OAS, ANB, APSB, ANC**

611-80

Payment shall be made in the amount awarded and for the period designated by the order of the SSWB in cases of appeal. Federal and State participation is available for retroactive payments in such cases, except in APSB and certain ANC cases where there is no Federal participation. (SEE SEC. 325-90, DISPOSITION OF CASE AFTER SSWB DECISION) (W&IC 1552, 1560, 2140, 2182, 3075, 3086, 3460)

**611-90 CANCELLATION OF AID WARRANTS
OAS, ANB, APSB, ANC**

611-90

Any warrant issued in payment of aid shall not be redeemed and shall be canceled if not presented for payment within six months after date of issuance. Every aid warrant should carry notice of this fact conspicuously on its face in order that persons holding such warrants will present them for payment within the time limit specified. The following wording is suggested: "Void after six months from date of warrant." (W&IC 222, 1560, 2140, 3075, 3460)

MAIN OFFICE
SACRAMENTO
616 K STREET
(14)

LOS ANGELES OFFICE
WASHINGTON BUILDING
311 SOUTH SPRING STREET
(13)

SAN FRANCISCO OFFICE
DAVID HEWES BUILDING
995 MARKET STREET
(3)

Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento 14
November 20, 1944

SOCIAL WELFARE BOARD
BEN KOENIG, CHAIRMAN
1680 NORTH VINE STREET
LOS ANGELES

MRS. MARY E. BARKWILL
ROUTE 1, BOX 55
LINDSAY

JOHN C. CUNEO
922 J STREET
MODESTO

WILFORD H. HOWARD
1815 REDWOOD HIGHWAY SOUTH
SANTA ROSA

GERALD C. KEPPEL
135 NORTH BRIGHT AVENUE
WHITTIER

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1170 SEVENTH AVENUE
SAN DIEGO

MRS. JESSIE S. WILLIAMSON
2816 OAK KNOLL TERRACE
BERKELEY

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

IN REPLY PLEASE REFER
TO:

Dear Mr. Jordan:

Attached are three copies of regulations,
currently effective, made by the State Department
of Social Welfare.

These regulations are filed in accordance
with Article 21 of Chapter 3 of Title 1 of Part
3 of the Political Code as amended by Chapter
628, Statutes of 1941.

Very sincerely yours,

C. M. Wollenberg

CHARLES M. WOLLENBERG, Director
Department of Social Welfare

1944 NOV 22 AM 10 54

Encl.
b5

MAIN OFFICE
616 K Street
Sacramento

LOS ANGELES OFFICE
Washington Building
311 South Spring Street

SAN FRANCISCO OFFICE
David Hewes Building
995 Market Street

Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento

November 20, 1944

1297

MANUAL LETTER NO. 67

FILED
In the office of the Secretary of State
of the State of California

NOV 22 1944

FRANK M. JORDAN, Secretary of State

By *Chas. H. Hagan* Deputy

The attached revisions 16 and other new sections of the Special Services Chapter are to be entered in your copy of the Manual of Policies and Procedures and the revision number cancelled on the separators for the revised chapter. The sections were approved by the Social Welfare Board on October 26, 1944.

New Sections 461-00 thru 461-08 describe the benefits accruing to returning veterans under the "G.I. Bill of Rights" (Service-men's Readjustment Act of 1944). These services and benefits fall into four main categories:

- Education of veterans (Sec. 461-02)
- Loans for the purchase or construction of homes, farms, and business property (Sec. 461-04)
- Employment of veterans (Sec. 461-06)
- Unemployment allowances (Sec. 461-08)

New Sections 461-50 thru 461-75 expand information in the Manual concerning the Home Service program and the Military and Naval Welfare Service, of the American Red Cross.

New Section 460-70 describes eligibility and benefits regarding mustering out pay for World War II Servicemen and Servicewomen.

STATEMENTS CONTAINED IN THE MANUAL TAKE PRECEDENCE
OVER SAME MATERIAL PREVIOUSLY RELEASED IN BULLETINS

460-50 (Continued)

5. Marriage of any brother, sister or child receiving the family allowance.
6. Remarriage of a former wife divorced to whom alimony has been payable, voiding the court order under which alimony has been decreed.
7. Cessation of dependency of a class B-1 or class B dependent. (For example, if dependent becomes self-supporting.)
8. Soldier's request that payment of family allowance to any class B-1 or class B dependent be terminated.

The law provides that entitlement to a family allowance will terminate on or be modified at the end of the month in which a change of status in the enlisted man or his dependents occurs, rendering them no longer eligible. (OFFICE OF DEPENDENCY BENEFITS BOOKLET FA-2)

460-55 EFFECT OF ALLOTMENTS UNDER THIS ACT ON OTHER ALLOTMENTS**460-55**

If class E and other allotments are of such size that the prescribed deduction of \$22 or \$27 per month cannot be made from the serviceman's pay and leave him at least \$10 per month for his personal use, exclusive of possible court martial forfeitures, it is necessary for the serviceman or his organization commander to either discontinue or adjust existing allotments.

460-60 PENALTIES FOR FRAUD UNDER THE SERVICEMEN'S DEPENDENTS ALLOWANCE ACT OF 1942**460-60**

Whoever shall obtain or receive any money, check, or family allowance... without being entitled thereto and with intent to defraud, shall be punished by a fine of not more than \$2,000, or by imprisonment for not more than one year, or both.

Whoever in any claim for family allowance or in any document requiredmakes any statement of a material fact, knowing it to be false, shall be guilty of perjury and shall be punished by a fine of not more than \$5,000, or by imprisonment for not more than two years, or both.

Any person who has been entitled to payment of a family allowance..... and whose entitlement to payment of such allowance has ceased shall, if he thereafter accepts payment of such allowance with intent to defraud, be punished by a fine of not more than \$2,000, by imprisonment for not more than one year, or

No part of any amount paid....shall be paid or delivered to or received by any agent or attorney on account of services rendered in connection with any family allowance....and the same shall be unlawful, any contract to the contrary notwithstanding. Any person violating this section shall be deemed guilty of a misdemeanor and upon conviction thereof shall be fined in any sum not less than \$100 nor more than \$1,000. (PUB L 625, 77TH CONGRESS)

460-42 METHOD OF PAYMENT

460-42

Unless otherwise requested by the applicant, the full sum due all dependents each month will be mailed in one check. For example, the monthly payment for a wife and two children will be mailed to the wife if she is named as payee in the application. Payments may be made to more than one dependent, if they are designated by the applicant as payees, or are determined to be proper payees. For example, the payments for a dependent father and a dependent mother-in-law may be made in two checks--one to each dependent--if both are dependent upon the serviceman for their support (class B-1). In the case of class B dependents, only one may be named as payee. (OFFICE OF DEPENDENCY BENEFITS BOOKLET FA-2)

460-45 FAMILY ALLOWANCES FOR DEPENDENTS OF MISSING SERVICEMEN

460-45

Allowances made by enlisted men may continue for one year if the man is missing in action, interned, or captured. Where the man had made no allowance or had made one that is insufficient for reasonable support of dependents or for payment of insurance premiums, the department concerned may set up an allowance or may increase the amount indicated by the serviceman. (PUB. LAW 490 77TH CONGRESS.)

460-50 TERMINATION OF FAMILY ALLOWANCES

460-50

Certain conditions cause termination of family allowances under the SDAA. These conditions are listed as follows:

1. Desertion from the service. Payment will terminate at the end of the month in which notice is received of the serviceman's conviction of desertion, or after the serviceman has been absent in desertion for 3 months, whichever ever occurs first. If he is later restored to duty, such family allowance may be reinstated as of the first of the month next succeeding that in which such restoration occurs.
2. Appointment of serviceman to a commissioned rank, or his death in, or discharge from the service.
3. Death of a beneficiary. This would terminate family allowance for that beneficiary only.
4. Attainment of 18th year of age by any brother, sister, or child, except one incapable of self-support by reason of mental or physical defect.

(Section Continued on Next Page)

460-89 OTHER CLAIMS, FOLLOWING DEATH IN SERVICE

460-89

The dependents of a man who dies in the service may be entitled to:

1. INSURANCE

If the man had taken out National Service Life Insurance, his beneficiary is entitled to payments if the insurance was in force. (SEE SEC. 460-95, NATIONAL SERVICE LIFE INSURANCE FOR SERVICEMEN.) For instance, a beneficiary of a serviceman who was covered by a \$10,000 National Service Life Insurance policy would receive the following payments in the event of the death of the insured serviceman:

If under 30 years of age, a monthly income for 20 years of. . \$55.10

If 30 years of age, a monthly income for life of. 39.70

If 40 years of age, a monthly income for life of. 45.00

If 50 years of age, a monthly income for life of. 53.90

If 60 years of age, a monthly income for life of. 68.10

Increased benefits for higher ages

(FACTS FOR NAVY MEN-ABOUT NATIONAL SERVICE LIFE INSURANCE, MAY, 1944) IN SOME CASES WHERE THE SERVICEMAN HAD NOT TAKEN OUT ANY INSURANCE, AUTOMATIC INSURANCE MAY BE PAYABLE. (SEE SEC. 460-98, AUTOMATIC INSURANCE FOR SERVICEMEN)

2. PENSION

Dependents of a person who dies in active service are usually entitled to a pension.

3. OLD AGE AND SURVIVOR'S INSURANCE

When a serviceman dies, the possibility that he had credits toward OASI benefits should be checked. If his employment prior to military service was in "covered employment" for the requisite period, it is possible that his dependents may be eligible to benefits under this program. (SEE SECS. 455-00 THRU 455-70, OLD AGE AND SURVIVORS INSURANCE BENEFITS) (RED CROSS ABRIDGED HANDBOOK OF HOME SERVICE INFORMATION)

460-70 MUSTERING OUT PAY FOR WORLD WAR II SERVICEMEN AND SERVICEWOMEN 460-70

Members of the armed forces with the rank of Captain and under in the Army and with the rank of Lieutenant, Senior Grade, and under in the Navy and equivalent ranks in the other services, honorably discharged or released from active service on or after December 7, 1941, from the armed forces are eligible to draw mustering-out pay. Only those members of the former WAAC's who were honorably discharged on account of disability are entitled to this pay.

The law provides \$100 to the honorably discharged veteran with less than 60 days active service; those with 60 days or more domestic service, \$200, payable in two equal monthly payments; and veterans with service of 60 days or more and who have had foreign service will receive \$300, payable in three equal monthly installments. Mustering-out pay is not taxable, subject to attachment, levy or seizure and shall be exempt from the claims of any creditor, including any claim of the United States. (PUB. LAW 225, 78TH CONGRESS)

460-80 DEATH IN SERVICE--BENEFITS DUE DEPENDENTS**460-80**

Dependents of a man who dies in service are usually entitled to one or more of a variety of benefits, including certain burial expenses, burial flag, etc.

Official notice of death in service is sent by commercial telegraph to the emergency address given by the man on entering service. Notification in any other manner should not be accepted as authentic. (RED CROSS ABRIDGED HANDBOOK OF HOME SERVICE INFORMATION)

Upon death in line of duty, not the result of own misconduct, of an officer, enlisted man, or nurse, a "death gratuity" (six months' pay at rate being received by deceased at death) is payable to widow, children, or other designated beneficiary. Immediately upon official notice of death the military authorities send the necessary forms to the beneficiary. (RED CROSS ABRIDGED HANDBOOK OF HOME SERVICE INFORMATION)

Upon official notice of death the finance officer mails to next of kin the required form on which to apply for any pay which was due the man at date of death. This should be filled out and mailed to General Accounting Office, Washington, D.C. If application form is not received by family within a reasonable time after death of man, they may write to The Adjutant General, War Department, or to Bureau of Supplies and Accounts, Navy Department. (RED CROSS ABRIDGED HANDBOOK OF HOME SERVICE INFORMATION)

461-02 (Continued)

461-02

2. IN NO EVENT SHALL THE TOTAL PERIOD OF EDUCATION OR TRAINING EXCEED FOUR YEARS;
3. ANY ELIGIBLE PERSON SHALL BE ELIGIBLE FOR AND ENTITLED TO SUCH COURSE OF EDUCATION OR TRAINING AS HE MAY ELECT, AND AT ANY APPROVED EDUCATIONAL OR TRAINING INSTITUTION AT WHICH HE CHOOSES TO ENROLL; ANY COURSE OF EDUCATION OR TRAINING MAY BE DISCONTINUED AT ANY TIME IF IT IS FOUND THAT THE CONDUCT OR PROGRESS OF ANY PERSON IS UNSATISFACTORY;
4. CUSTOMARY COST OF TUITION, AND SUCH LABORATORY, LIBRARY, HEALTH, INFIRMARY, AND OTHER SIMILAR FEES AND BOOKS, SUPPLIES, EQUIPMENT AND OTHER NECESSARY EXPENSES, EXCLUSIVE OF BOARD, LODGING, OTHER LIVING EXPENSES, AND TRAVEL SHALL BE PAID FOR BY THE VETERANS ADMINISTRATION; NO SUCH PAYMENTS SHALL EXCEED \$500 FOR AN ORDINARY SCHOOL YEAR;
5. WHILE ENROLLED IN A COURSE A PERSON, UPON APPLICATION TO THE VETERANS ADMINISTRATION, SHALL BE PAID A SUBSISTENCE ALLOWANCE OF \$50 PER MONTH, IF WITHOUT A DEPENDENT OR DEPENDENTS, OR \$75 PER MONTH, IF HE HAS A DEPENDENT OR DEPENDENTS; A PERSON ATTENDING A COURSE ON A PART-TIME BASIS SHALL BE ENTITLED TO RECEIVE LESSER SUMS. (PUB. LAW 346, 78TH CONGRESS; SERVICEMEN'S READJUSTMENT ACT OF 1944)

461-04 LOANS FOR THE PURCHASE OR CONSTRUCTION OF HOMES, FARMS, AND BUSINESS PROPERTY UNDER SERVICEMEN'S READJUSTMENT ACT OF 1944

461-04

GENERAL PROVISIONS FOR LOANS

1. SERVICE IN ACTIVE MILITARY OR NAVAL FORCES OF UNITED STATES AT ANY TIME ON OR AFTER SEPTEMBER 16, 1940, AND PRIOR TO TERMINATION OF THE PRESENT WAR.
2. HONORABLE DISCHARGE AFTER NINETY DAYS SERVICE.
3. APPLICATION MUST BE MADE WITHIN TWO YEARS AFTER SEPARATION FROM SERVICE OR TWO YEARS AFTER TERMINATION OF THE WAR, WHICHEVER IS THE LATER DATE, BUT IN NO EVENT MORE THAN FIVE YEARS AFTER THE TERMINATION OF THE WAR.
4. LOANS WILL BE GUARANTEED UP TO 50% BUT NOT TO EXCEED AN AGGREGATE AMOUNT OF \$2000.
5. INTEREST FOR FIRST YEAR ON THAT PART OF LOAN GUARANTEED BY VETERANS ADMINISTRATION SHALL BE PAID BY THAT AGENCY.
6. LOANS GUARANTEED SHALL BEAR INTEREST RATE OF 4% AND SHALL BE PAYABLE IN NOT MORE THAN TWENTY YEARS.
7. IN ANY CASE WHEREIN A PRINCIPAL LOAN HAS BEEN APPROVED AND THE VETERAN IS IN NEED OF A SECOND LOAN TO COVER THE REMAINDER OF THE PURCHASE PRICE OR COST, THE VETERANS ADMINISTRATION MAY GUARANTEE THE FULL AMOUNT OF THE SECOND LOAN, PROVIDED THAT THE SECOND LOAN SHALL NOT EXCEED 20% OF THE PURCHASE PRICE.

PURCHASE OR CONSTRUCTION OF HOMES

Loans may be guaranteed for veterans by the Veterans Administration in purchasing residential property or in constructing a dwelling on unimproved property owned by him to be occupied by him as his home subject to certain restrictions.

PURCHASE OF FARMS AND FARM EQUIPMENT

Loans may be guaranteed for veterans by the Veterans Administration to be used in purchasing any land, building, livestock, equipment, machinery, or implements, or in repairing, altering, or improving any buildings or equipment to be used in farming operations conducted by the applicant, subject to certain restrictions.

(Section Continued on Next Page)

**SERVICEMEN'S READJUSTMENT ACT OF 1944
(G. I. BILL OF RIGHTS)**

461-00 GENERAL PROVISIONS OF SERVICEMEN'S READJUSTMENT ACT OF 1944**461-00**

Public Law 346 passed by the Congress June 22, 1944, entitled "Servicemen's Readjustment Act of 1944" (commonly known as "G.I. Bill of Rights") enlarges in scope some services and benefits now available to veterans of the present war and provides for some additional services and benefits to be administered by the Veterans Administration. These services and benefits fall into four main categories: education of veterans; loans for the purchase or construction of homes, farms and business property; employment of veterans; readjustment allowances for former members of the armed forces who are unemployed. Sections which follow describe these services and benefits. (PUB. LAW 346, 78TH CONGRESS; SERVICEMEN'S READJUSTMENT ACT OF 1944)

461-02 EDUCATION OF VETERANS UNDER SERVICEMEN'S READJUSTMENT ACT OF 1944**461-02**

Eligibility for this benefit is available to those former members of the military or naval service:

1. WHO SERVED ON OR AFTER SEPTEMBER 16, 1940, AND PRIOR TO THE TERMINATION OF THE PRESENT WAR;
2. WHO SHALL HAVE BEEN DISCHARGED OR RELEASED THEREFROM UNDER CONDITIONS OTHER THAN DISHONORABLE;
3. WHOSE EDUCATION OR TRAINING WAS IMPEDED, DELAYED, INTERRUPTED, OR INTERFERED WITH BY ENTRANCE INTO THE SERVICE, OR WHO DESIRED A REFRESHER OR RETRAINING COURSE; WITH A PRESUMPTION THAT ANY PERSON WHO WAS NOT OVER 25 WHEN HE ENTERED THE SERVICE SHALL BE DEEMED TO HAVE HAD HIS EDUCATION OR TRAINING IMPEDED, DELAYED, INTERRUPTED, OR INTERFERED WITH;
4. WHO SHALL HAVE SERVED NINETY DAYS OR MORE, EXCLUSIVE OF ANY PERIOD OF EDUCATION OR TRAINING BY THE ARMY OR NAVY;
5. OR WHO SHALL HAVE BEEN DISCHARGED OR RELEASED FROM ACTIVE SERVICE BY REASON OF ACTUAL SERVICE INCURRED INJURY OR DISABILITY.

LIMITATIONS FOR THIS BENEFIT AND SERVICE ARE:

1. THAT SUCH COURSE SHALL BE INITIATED NOT LATER THAN TWO YEARS AFTER EITHER THE DATE OF DISCHARGE OR THE TERMINATION OF THE PRESENT WAR, WHICHEVER IS THE LATER;
2. THAT NO SUCH EDUCATION OR TRAINING SHALL BE AFFORDED BEYOND SEVEN YEARS AFTER THE TERMINATION OF THE PRESENT WAR.

BENEFITS AND SERVICES UNDER THIS SECTION INCLUDE:

1. ANY ELIGIBLE PERSON SHALL BE ENTITLED TO EDUCATION OR TRAINING, OR A REFRESHER OR RETRAINING COURSE, AT AN APPROVED EDUCATIONAL OR TRAINING INSTITUTION, FOR A PERIOD OF ONE YEAR (OR THE EQUIVALENT THEREOF IN CONTINUOUS PART-TIME STUDY); HOWEVER, SUCH PERSON SHALL BE ENTITLED TO AN ADDITIONAL PERIOD OR PERIODS OF EDUCATION OR TRAINING, NOT TO EXCEED THE TIME AN ELIGIBLE PERSON WAS IN THE ACTIVE SERVICE ON OR AFTER SEPTEMBER 16, 1940, AND BEFORE THE TERMINATION OF THE WAR, WITH CERTAIN EXCEPTIONS;

(Section Continued on Next Page)

**461-20 VOCATIONAL REHABILITATION OF PERSONS DISABLED IN WORLD WAR II
BY VETERANS ADMINISTRATION**

461-20

This section describes provisions of legislation enacted March 16, 1943, which established a system of vocational rehabilitation for persons disabled in the present war, the purpose being to restore employability lost by virtue of a handicap due to disability incurred in or aggravated by service. The Veterans Administration is responsible for administering this program.

ELIGIBILITY

Requirements for entitlement to vocation rehabilitation under this law are:

- (1) Active military or naval service at any time after December 6, 1941, and during the present war.
- (2) Honorable discharge.
- (3) Service - connected disability due to World War II Service.
- (4) Vocational handicap due to such disability.
- (5) Need for vocational rehabilitation to overcome such handicaps.

A vocational handicap will be said to exist when the service-connected disability is such as to interfere with securing and pursuing employment comparable to that for which the veteran is qualified by education, training, and experience.

PENSION

Upon entrance into vocational training the veteran's pension will be:

\$80	per month	if he has no dependents
90	" "	if he has a wife but no child
95	" "	if he has a wife and 1 child (with \$5 for each additional child)
10	" "	for each dependent parent in addition to the above amounts

Note: If the disabled person is entitled to a higher rate of pension or retirement pay for service-connected disability, such higher rate will be paid in lieu of the above training rates.

Pension is increased or decreased according to changes in family status such as marriage or divorce, birth or adoption of children, etc. Pension is discontinued (1) if trainee receives a wage or other income while training on a job; (2) when the course is interrupted or discontinued; or (3) on the first day of the third calendar month after that in which employability has been determined. Upon discontinuance of the training award, case is reviewed and the amount of disability pension then payable will be determined.

LENGTH OF TRAINING

No course of training in excess of 4 years may be approved, nor may any training be afforded beyond 6 years after the termination of the present war.

LOANS TO VETERANS IN TRAINING

The Veterans administration will have a revolving fund from which advances not to exceed \$100 in any one case may be made to persons commencing or undergoing training. (ABRIDGED HANDBOOK OF HOME SERVICE INFORMATION, AMERICAN NATIONAL RED CROSS (REV. OCT. 1943); PUBLIC LAW 16, 78TH CONGRESS)

461-04 (Continued)

461-04

PURCHASE OF BUSINESS PROPERTY

Loans may be guaranteed for veterans by the Veterans Administration to be used in purchasing any business, land, buildings, supplies, equipment, machinery, or tools, to be used by the applicant in pursuing a gainful occupation (other than farming), subject to certain restrictions. (PUB. LAW 346, 78TH CONGRESS; SERVICEMEN'S READJUSTMENT ACT OF 1944)

461-06 EMPLOYMENT OF VETERANS UNDER SERVICEMEN'S READJUSTMENT ACT OF 1944

461-06

In order to provide for effective job counseling and employment placement service for veterans the Veterans Placement Service Board has been established which shall determine all matters of policy relating to the administration of the Veterans Employment Service of the United States Employment Service. The Board consists of the Administrator of Veterans Affairs as chairman; the Director of the Selective Service System; and the Administrator of the Social Security Agency. Veteran's employment representatives will be assigned to the staffs of local USES offices for job counseling and employment placement service for veterans. (PUB. LAW 346, 78TH CONGRESS; SERVICEMEN'S READJUSTMENT ACT OF 1944)

461-08 UNEMPLOYMENT ALLOWANCES UNDER THE SERVICEMEN'S READJUSTMENT ACT OF 1944

461-08

This provision of the Servicemen's Readjustment Act of 1944 provides for the payment of unemployment compensation to unemployed veterans of World War II at the rate of \$20 per week.

To qualify, a veteran must have served 90 days or if less he must have been discharged or released by reason of service incurred disability. For every calendar month or major fraction thereof of actual service the veteran shall be entitled to four weeks of allowances not to exceed the 52 weeks' maximum, but the allowance for the qualifying 90 days service shall be eight weeks for each month of qualifying service.

Unemployed veterans shall be entitled to receive "readjustment allowances" for unemployment which occurs not later than two years after discharge or release or the termination of the war, whichever is the later date.

No readjustment allowance shall be payable for any week commencing more than five years after the termination of hostilities in the present war.

The law includes the "self-employed" veteran (engaged in an independent establishment, trade, business, profession or other vocation for profit). These "self-employed" would show they were engaged in some profession, trade or business of their own and that their monthly earnings have been less than \$100 the previous calendar month. Such "self-employed" veteran then would be entitled to receive the difference between the net earnings for the month and \$100.

Any veteran, to be eligible for this benefit, must show he is residing in the United States at time of making the claim; that he is completely unemployed or partially unemployed; that he is registered with and continues to be registered with a public employment office; and that he is able and available for suitable work. (PUB. LAW 346, 78TH CONGRESS; SERVICEMEN'S READJUSTMENT ACT OF 1944)

461-55 (Continued)

461-55

TO WHOM SERVICE IS AVAILABLE

1. SERVICE PERSONNEL - RED CROSS HOME SERVICE IS AVAILABLE TO MEMBERS (INCLUDING NURSES) OF THE ARMY, NAVY, MARINE CORPS, AND COAST GUARD IN ACTIVE SERVICE AND TO THEIR DEPENDENTS AND TO EX-SERVICEMEN AND THEIR DEPENDENTS.
2. UNITED NATIONS - THE AMERICAN RED CROSS GIVES THE SAME TYPE OF SERVICE TO ACTIVE SERVICEMEN AND EX-SERVICEMEN OF THE UNITED NATIONS THAT IS EXTENDED TO MEN OF OUR OWN FORCES. DEPENDENTS OF MEN IN THE FORCES OF THE UNITED NATIONS AND OF EX-SERVICEMEN OF THESE FORCES, WHEN SUCH DEPENDENTS ARE RESIDENTS IN THE UNITED STATES, RECEIVE THE SAME SERVICE OFFERED TO FAMILIES OF UNITED STATES SERVICEMEN, EXCEPT AS THIS MAY BE LIMITED BY THE FACT THAT THE RED CROSS IN THE COUNTRY FROM WHICH THE UNITED NATIONS TROOPS COME MAY NOT PROVIDE HOME SERVICE SUCH AS IS PROVIDED BY THE AMERICAN RED CROSS.
3. SPECIAL GROUPS - RED CROSS SERVICE IS EXTENDED TO THE NEW GROUPS WHICH HAVE BEEN ESTABLISHED FOR SPECIAL FUNCTIONS, AND WHO ARE EXPOSED TO THE HAZARDS AND DISLOCATIONS OF WAR - THESE INCLUDE THE WOMEN'S ARMY CORPS, THE WOMEN'S RESERVE OF THE U. S. NAVAL RESERVE, THE WOMEN'S RESERVE OF THE COAST GUARD, AND THE U. S. MARINE CORPS RESERVE. SERVICE IS ALSO GIVEN TO THE MEN AND WOMEN CIVILIAN PILOTS OF THE ARMY AIR TRANSPORT COMMAND.
4. CIVILIANS - CIVILIANS SERVING WITH THE ARMED FORCES OUTSIDE THE UNITED STATES ARE ACCORDED SERVICE BY RED CROSS FIELD DIRECTORS, AND CHAPTERS WILL MAKE THEIR COMMUNICATION AND INFORMATION, REPORTING AND CLAIMS SERVICES AVAILABLE WHENEVER THESE ARE REQUIRED. FAMILIES OF SUCH CIVILIAN PERSONNEL, WHEN FAMILY SERVICE IS REQUIRED, WILL BE REFERRED BY HOME SERVICE TO THE APPROPRIATE CIVILIAN AGENCIES.

CHAPTERS MAY PROVIDE RELIEF AND OTHER SERVICES TO CIVILIAN FAMILIES OR INDIVIDUALS IN THOSE COMMUNITIES IN WHICH THERE ARE NO OTHER RESOURCES FOR THE KIND OF ASSISTANCE NEEDED.
5. UNITED STATES MERCHANT MARINE - THE MERCHANT MARINE IS A CIVILIAN ORGANIZATION. ITS MEMBERS ARE, HOWEVER, EXPOSED TO EXTREME HAZARDS OF WAR, PARTICULARLY IN AREAS SUBJECT TO ENEMY SUBMARINE ACTION. CONSEQUENTLY, THE RED CROSS RECOGNIZES OFFICERS AND MEN OF THE MERCHANT MARINE AND THEIR FAMILIES AS ELIGIBLE FOR ITS COMMUNICATION AND INFORMATION, REPORTING, CLAIMS, AND REFERRAL SERVICES DURING THOSE PERIODS WHEN SUCH OFFICERS AND MEN ARE UNDER CONTRACT FOR A SPECIFIED CRUISE OR TRIP. SUCH SERVICES WILL BE EXTENDED BY FIELD DIRECTORS BOTH HERE AND ABROAD.

LIMITATIONS OF HOME SERVICE

1. RESERVISTS NOT ON ACTIVE DUTY - MEMBERS OF (A) THE REGULAR ARMY RESERVE, (B) THE ARMY AND NAVY RESERVE OFFICERS TRAINING CORPS, AND (C) THE ARMY AND NAVY ENLISTED RESERVE, UNTIL CALLED INTO ACTIVE DUTY, ARE IN CIVILIAN STATUS AND ARE NOT ELIGIBLE FOR RED CROSS SERVICE OTHER THAN SUCH REPORTING SERVICE AS MAY BE REQUESTED BY MILITARY OR NAVAL AUTHORITIES.
2. STATE GUARDS - STATE GUARDS (ESTABLISHED TO REPLACE THE NATIONAL GUARD UNITS WHICH WERE INDUCTED INTO FEDERAL SERVICE) ARE SOLELY STATE ORGANIZATIONS, WHICH ARE NOT SUBJECT TO CALL FOR FEDERAL SERVICE AS A UNIT (ALTHOUGH INDIVIDUAL MEMBERS ARE SUBJECT TO CALL), THEREFORE, REQUESTS FOR ASSISTANCE TO STATE GUARDSMEN AND THEIR FAMILIES ARE REFERRED TO A CIVILIAN AGENCY.

(Section Continued on Next Page)

AMERICAN RED CROSS

461-50 SERVICES OF THE AMERICAN RED CROSS

461-50

It is the primary responsibility of the American Red Cross to assist servicemen and ex-servicemen and their families in meeting those needs which arise from the man's service in the armed forces and to assist them in obtaining the benefits to which they are entitled. Sections which follow briefly describe some of the major services. (ABRIDGED HANDBOOK OF HOME SERVICE INFORMATION, THE AMERICAN NATIONAL RED CROSS (REV. OCT. 1943).)

461-55 HOME SERVICE PROGRAM OF RED CROSS FOR SERVICE AND EX-SERVICEMEN AND FAMILIES 461-55

SCOPE OF PROGRAM

The responsibility of Home Service is to assist servicemen and ex-servicemen and their families in meeting those needs which arise from the man's service in the armed forces. Home Service in chapters carries out this responsibility through the following functions:

1. COMMUNICATIONS - ASSISTING WITH COMMUNICATIONS BETWEEN THE SERVICEMEN AND THEIR FAMILIES WHEN COMMON MEANS OF COMMUNICATION ARE NOT AVAILABLE OR EFFECTIVE, OR WHEN THE SITUATION IS OF SUCH NATURE THAT A PERSONAL VISIT OR INTERVIEW BY RED CROSS IS DESIRABLE.

COMMUNICATING THROUGH INTERNATIONAL RED CROSS IN SITUATIONS WHERE NORMAL CHANNELS OF COMMUNICATION ARE DISRUPTED.
2. INFORMATION - SUPPLYING INFORMATION CONCERNING GOVERNMENT REGULATIONS AND LEGISLATION AFFECTING SERVICE AND EX-SERVICEMEN AND THEIR FAMILIES, AND CONCERNING INTERNATIONAL RED CROSS AND ITS REGULATIONS. SUPPLYING INFORMATION ABOUT COMMUNITY RESOURCES AND ASSISTANCE AVAILABLE FOR FAMILIES.
3. BENEFITS AND CLAIMS - ASSISTING SERVICEMEN AND THEIR DEPENDENTS IN APPLYING FOR FAMILY ALLOWANCES AND EX-SERVICEMEN AND THEIR DEPENDENTS IN PRESENTING CLAIMS FOR PENSIONS AND OTHER GOVERNMENT BENEFITS.
4. REPORTS - ASSISTING THE MILITARY OR NAVAL AUTHORITIES BY OBTAINING SOCIAL HISTORY MATERIAL REQUIRED FOR MEDICAL TREATMENT, AND BY MAKING REPORTS ON HOME CONDITIONS NEEDED BY COMMANDING OFFICERS IN DECIDING QUESTIONS OF DISCHARGE, FURLOUGH, OR CLEMENCY.
5. FINANCIAL ASSISTANCE - PROVIDING FINANCIAL ASSISTANCE FOR BASIC MAINTENANCE ON THE BASIS OF NEED TO DEPENDENTS OF SERVICEMEN AND TO DISABLED EX-SERVICEMEN AND THEIR DEPENDENTS DURING THE TEMPORARY PERIOD WHEN THE APPLICATION OR CLAIM FOR GOVERNMENT BENEFITS--INCLUDING FAMILY ALLOWANCES, ALLOTMENTS, PENSIONS, AND INSURANCE BENEFITS--IS PENDING. THIS TEMPORARY PERIOD SHOULD BE CONSIDERED TO TERMINATE UPON RECEIPT OF PAYMENT OR UPON THE FIRST UNFAVORABLE ADJUDICATION. CASES SHALL NOT BE REFERRED TO OTHER AGENCIES FOR BASIS MAINTENANCE DURING THIS TEMPORARY PERIOD. IN CASES RECEIVING GOVERNMENT BENEFITS HOME SERVICE MAKES ITS OTHER SERVICES AVAILABLE BUT DOES NOT GENERALLY SUPPLEMENT GOVERNMENT BENEFITS. CASES DENIED GOVERNMENT BENEFITS AND WHERE NEEDS CONTINUE WILL BE REFERRED TO OTHER AGENCIES; HOME SERVICE MAY CONTINUE FINANCIAL ASSISTANCE FOR A LIMITED PERIOD PENDING THE ASSUMPTION OF RESPONSIBILITY BY OTHER AGENCIES.

THROUGH REFERRAL TO OTHER AGENCIES, THE RED CROSS ASSISTS SERVICEMEN AND EX-SERVICEMEN AND THEIR DEPENDENTS IN MEETING SPECIAL AND NON-RECURRING NEEDS. HOME SERVICE SHOULD MEET SPECIAL AND NON-RECURRING NEEDS IF OTHER RESOURCES TO MEET THEM DO NOT EXIST IN COMMUNITIES, AND IF CHAPTER FUNDS ARE AVAILABLE FOR THE PURPOSE.

HOME SERVICE DOES NOT HAVE RESPONSIBILITY FOR MEETING THE FINANCIAL NEEDS OF THE ABLE-BODIED EX-SERVICEMEN AND HIS DEPENDENTS OR OF THE DISABLED MEN WHOSE DISABILITY IS NOT DUE TO SERVICE. HOME SERVICE SHOULD MAKE ITS OTHER SERVICES AVAILABLE TO THIS GROUP.

(Section Continued on Next Page)

461-65 (Continued)

461-65

INTERPRETING TO THE PATIENT'S FAMILY HIS MEDICAL CONDITION, THE TREATMENT PRESCRIBED, AND PLANS FOR ANY NEEDED FUTURE CARE; ASSISTING IN THE PLANS FOR THE COMFORT AND GUIDANCE OF VISITING RELATIVES.

PLANNING, WITH THE PATIENT AND THE MEDICAL OFFICER, WHATEVER MEASURES ARE NEEDED TO RELIEVE THE PATIENT FROM TENSION RESULTING FROM PROBLEMS CONCERNING HIM AND HIS FAMILY.

FURNISHING INFORMATION ABOUT GOVERNMENT BENEFITS, AND ASSISTANCE IN THE PREPARATION OF CLAIMS FOR POTENTIAL BENEFITS; ASSISTING PATIENTS WHO ARE TO BE SEPARATED FROM SERVICE DUE TO DISABILITY IN MAKING PLANS FOR ADJUSTMENT TO CIVILIAN LIFE.

PROVIDING LOANS OR GRANTS TO PATIENTS OR THEIR DEPENDENTS, WHEN INDICATED; PROVIDING COMFORT ARTICLES TO THE PATIENT WHEN REQUIRED.

PROVIDING MEDICALLY APPROVED RECREATION FOR PATIENTS, INCLUDING SUCH FEATURES AS: READING MATERIAL, GAMES, MOTION PICTURES, ENTERTAINMENTS.

SUPPLEMENTING OFFICIAL NOTIFICATIONS REGARDING PATIENTS WHOSE CONDITION IS CONSIDERED CRITICAL, AND REGARDING THOSE WHO DIE IN HOSPITALS, BY LETTERS TO THE RELATIVES, TO GIVE THEM PERSONAL DETAILS; HELPING PATIENTS TO MAINTAIN CORRESPONDENCE WITH THEIR FAMILIES WHEN THEY ARE UNABLE TO DO SO UNAIDED.

CASE WORK SERVICE TO THE DUTY PERSONNEL OF THE HOSPITAL (SUCH AS IS RENDERED IN CAMPS BY THE FIELD DIRECTOR THERE) INCLUDING HOME CONDITION REPORTS, LOANS AND GRANTS, ETC.

The hospital worker secures, through communication by letter or message, the cooperation of the Red Cross Chapter in the appropriate locality in whatever service is suited to the need (a) of a patient, or (b) of a member of duty personnel. (ABRIDGED HANDBOOK OF HOME SERVICE INFORMATION, THE AMERICAN NATIONAL RED CROSS (REV., OCT. 1943))

461-75 INTER-AGENCY RELATIONSHIPS OF RED CROSS

461-75

Home Service will make cooperative arrangements with other organizations for mutual use of specialized services, such as communications and information services of Home Service, and medical, psychiatric, vocational, child placement, and legal services of other agencies. In the provision of financial assistance, cases currently active with other agencies may remain with those agencies with the Red Cross makings it services, other than financial assistance, available, or representatives of both agencies may confer on individual cases to determine which agency will continue financial responsibility.

(ABRIDGED HANDBOOK OF HOME SERVICE INFORMATION, THE AMERICAN NATIONAL RED CROSS (REV. OCT. 1943))

461-55 (Continued)

461-65

3. CONSCIENTIOUS OBJECTORS - UNDER THE SELECTIVE TRAINING AND SERVICE ACT A CONSCIENTIOUS OBJECTOR SHALL BE EITHER (A) ASSIGNED TO NON-COMBATANT SERVICE OR (B) IF CONSCIENTIOUSLY OPPOSED TO PARTICIPATION IN NON-COMBATANT SERVICE "HE SHALL BE ASSIGNED TO WORK OF NATIONAL IMPORTANCE UNDER CIVILIAN DIRECTION." GROUP (A) ARE MEMBERS OF THE ACTIVE FORCES, AND ARE ENTITLED TO THE SAME BENEFITS AS OTHER SERVICEMEN, I.E., INSURANCE, FAMILY ALLOWANCES, ETC. GROUP (B) MEMBERS REMAIN IN CIVILIAN STATUS, BEING ASSIGNED TO CIVILIAN PUBLIC SERVICE CAMPS WHICH ARE SUPPORTED BY THE NATIONAL BOARD FOR RELIGIOUS OBJECTORS.

RED CROSS SERVICE IS AS FOLLOWS: GROUP (A) AS MEMBERS OF THE ARMED FORCES, IS ELIGIBLE FOR THE REGULAR SERVICES OF COMMUNICATION AND INFORMATION, REPORTING, CLAIMS, AND FAMILY SERVICE. GROUP (B) IS ENTITLED TO REFERRAL SERVICE, ENABLING THE APPLICANT TO MAKE USE OF THE RESOURCES PROVIDED BY THE APPROPRIATE SECTARIAN GROUP.

(ABRIDGED HANDBOOK OF HOME SERVICE INFORMATION, THE AMERICAN NATIONAL RED CROSS (REV. OCT. 1943).)

461-65 MILITARY AND NAVAL WELFARE SERVICE OF RED CROSS

461-65

CAMP SERVICE

Red Cross field directors, placed by the national organization, serve each Army, Navy, Marine Corps, and Coast Guard station in the United States and its possessions. Field directors or assistant field directors are stationed at all principal Army and Navy stations, while smaller posts are covered on an itinerant basis. These workers afford assistance to servicemen who are disturbed by personal or family problems, through the cooperation of home chapters when that is needed. Men who are discharged from service because of disability are aided by the field director in filing claims for government claims.

Field directors are assigned to all units of the armed forces and, in general, accompany them to whatever foreign country they may be destined. Services overseas are similar to those rendered in camps within the United States. In addition, specially trained recreation workers assist with or supplement the recreation work of the Special Service Division of the Army.

MILITARY HOSPITALS

The Red Cross provides social service to patients in hospitals of the Army and Navy, including certain hospitals for mental illnesses. The major aspects of the hospital program are:

HELPING THE PATIENT TO UNDERSTAND HIS CONDITIONS AND ACCEPT ITS IMPLICATIONS; TO FOLLOW TREATMENT RECOMMENDATIONS, AND ADJUST TO THE HOSPITAL SITUATION.

ASSISTING THE MEDICAL OFFICER, WHEN REQUESTED, THROUGH SECURING AND INTERPRETING INFORMATION CONCERNING THE EARLIER HISTORY AND CURRENT SOCIAL SITUATION OF THE PATIENT, PERTINENT TO AN UNDERSTANDING OF HIS CONDITION; INTERPRETING TO THE MEDICAL OFFICER THE PATIENT'S REACTIONS TO HOSPITAL ROUTINE.

(Section Continued on Next Page)

MAIN OFFICE
SACRAMENTO
616 K STREET
(14)

LOS ANGELES OFFICE
WASHINGTON BUILDING
311 SOUTH SPRING STREET
(13)

SAN FRANCISCO OFFICE
DAVID HEWES BUILDING
995 MARKET STREET
(3)

Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento 14
November 24, 1944

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

SOCIAL WELFARE BOARD

BEN KOENIG, CHAIRMAN
1680 NORTH VINE STREET
LOS ANGELES

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GERALD C. KEPPLER
135 NORTH BRIGHT AVENUE
WHITTIER

JOHN T. MARTIN
1170 SEVENTH AVENUE
SAN DIEGO

MRS. JESSIE S. WILLIAMSON
2816 OAK KNOLL TERRACE
BERKELEY

IN REPLY PLEASE REFER
TO:

Dear Mr. Jordan:

Attached are three copies of regulations,
currently effective, made by the State Department
of Social Welfare.

These regulations are filed in accordance
with Article 21 of Chapter 3 of Title 1 of Part
3 of the Political Code as amended by Chapter
628, Statutes of 1941.

Very sincerely yours,

Charles M. Wollenberg
CHARLES M. WOLLENBERG, Director
Department of Social Welfare

Encl.
b5

1944 NOV 27 AM 11 05

MAIN OFFICE
616 K Street
Sacramento

LOS ANGELES OFFICE
Washington Building
311 South Spring Street

SAN FRANCISCO OFFICE
David Hewes Building
995 Market Street

Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento
November 24, 1944

1297

FILED
In the office of the Secretary of State
of the State of California
NOV 27 1944
FRANK M. JORDAN, Secretary of State
By *[Signature]* Deputy

MANUAL LETTER NO. 68

The attached revisions 1 thru 6 to the Amount of Grant Chapter are to be entered in your copy of the Manual of Policies and Procedures and the revision numbers cancelled on the separator for the revised chapter.

Sec. 155-25, Total Need - Determination by Budget, now includes the revised OAS budget schedule adopted by the Social Welfare Board on October 26, 1944, and released in Bulletin 241. The examples included in the section have been revised to conform to the revised budget items.

As provided in Bulletin No. 241, the revised budget schedule shall become effective not later than December 1, 1944, when new applicants or those requesting restoration of aid elect to have need determined on a budget basis. Any necessary adjustment in the grant of those currently receiving aid shall become effective not later than January 1, 1945.

Issuance of this material renders obsolete Bulletin No. 241.

STATEMENTS CONTAINED IN THE MANUAL TAKE PRECEDENCE
OVER SAME MATERIAL PREVIOUSLY RELEASED IN BULLETINS

155-25 (Continued)

Page 2 of 155-25

The amount of aid plus the income (other than casual income and exempt agricultural income) shall not exceed the total need except to the extent that the grant is adjusted to the next highest whole dollar.

Example: Total need as determined by the recipient's budget is \$63.80. He has OASI income of \$15.37 per month. The difference is \$48.43. Aid is granted in this amount or in the amount of \$49, the next higher whole dollar.

Any applicant or recipient who would benefit by having his net income deducted from his total need as established by a budget of his requirements may request that his grant be figured accordingly, and any necessary adjustment in the grant shall be made as soon as administratively possible. Responsibility rests upon the county to inform the recipient of the possible advantages accruing to him should he elect to have his income applied to total need as determined by his budget.

When figuring the total need of an individual according to his requirements, due regard shall be given to the Budget Schedule as adopted by the SSWB.

BUDGET SCHEDULE

The current Budget Schedule as adopted by the Social Welfare Board is as follows:

Food	\$19.25	(Increase 75% to \$33.69 if all meals are purchased in restaurants.)
Housing, as paid, for example	20.00	
Utilities, as paid, or the following minima		
Electricity	1.20	
Gas	1.85	
Water	1.40	
Garbage	.50	
Other, for example, heat	3.15	
Household operations	3.50	
Clothing	5.10	
Incidentals and personal needs	10.00	
Transportation	3.00	
Special Needs, such as medical care, etc., in the amount of actual cost. (See Sec. 155-50, Definition and Determination of Special Needs in OAS, for description of common special needs.)		
Total	\$68.95	

(Section Continued on Next Page)

155-20 (Continued)

155-20

2. Irregular income of such a nature that consideration of the income received in the past is the only possible way of estimating the amount that the recipient might reasonably expect to receive in the future. That amount which represents the monthly average over the preceding three months' period reduced to the nearest whole dollar may be deducted in determining the grant.

Example C: A recipient regularly engages in the repairing of lawn mowers and his exact income from month to month can not be foretold. Income over the past three months has been as follows: June earnings, \$9.50; July earnings, \$12.75; August earnings, \$9.90; total earnings, \$32.15 or a monthly average of \$10.71. Therefore, \$10 is determined to be the recipient's average monthly income, and the grant is \$40 (\$50 minus \$10).

3. Income which represents both fixed and adjustable income.

Example D: A recipient whose need does not exceed \$50 is furnished free utilities by his daughter which are estimated at approximately \$4.35. In addition he receives OASI in the amount of \$21.85. The estimated income may be lowered to \$4.15 which, when added to the fixed income of \$21.85, adjusts the total income to \$26. Aid is then granted in the amount of \$24 (\$50 minus \$26).

When reporting income on the Certificate of Verification of Eligibility Form Ag 201, or on the Notice of Change (Form Ag 232), the adjusted amount of income that was used in determining the grant should be reported. (See Secs. 237-10, Instructions for Certificate of Eligibility, and 362-05, Instructions for Recording on Notice of Change, Section I.) (W&IC 2140)

155-25 TOTAL NEED - DETERMINATION BY BUDGET OAS

Page 1 of 155-25

The individual's budget is one way of establishing total need when it is in excess of \$50 a month. (See Sec. 155-30, Total Need - Statutory Maximum (\$50) Plus Special Needs, for another way of determining that total need is in excess of \$50.) When a budget of the individual's requirements shows that his need is in excess of \$50 a month the grant is determined by subtracting the income, other than casual income and exempt agricultural income, from the total need as established by the budget, except that in no event may the grant exceed \$50. (See Secs. 150-50, Types of Casual Income, and 151-95, Income from Agricultural Labor.) When the difference is in partial dollars, aid may be granted in that amount which represents the next highest whole dollar.

(Section Continued on Next Page)

155-25 (Continued)

Page 4 of 155-25

- (c) If the recipient lives in a home which he owns or in which he has an interest, the item of "Housing" is the sum of the costs of ownership and the net value of occupancy, if any, as determined under Sec. 152-10, Occupancy Value of Homes Owned By Recipients. In addition to the expenses of ownership which include taxes, insurance, assessments, and required encumbrance payments, an allowance of \$2 a month shall be made to cover the average cost of minor repair and upkeep. (The expense of occasional repair which is not met through the normal upkeep allowance and which is necessary to provide safe, healthful housing or to minimize deterioration, should be included as a separate special item of need. (See Sec. 155-50.)

When the recipient has an interest in the home with other persons, the value of occupancy plus his prorated share of the expenses of ownership represents his housing need, i.e., if the home is owned jointly with the wife, one-half of the expenses of ownership plus occupancy value, if any, is the housing need; if owned jointly by three persons, the recipient's housing need is one-third of the expenses of ownership plus the occupancy value, if any.

3. Utilities

Those utilities or services actually used by the individual represent his need. The amount allowed for the individual utility item may be as paid or the amount set forth on the Budget Schedule. If there is need for wood, coal, oil, garbage service, etc., the average cost of the particular item represents the need. When there are two or more members of the household, and the recipient reports that he pays only his prorated share, the amount as paid is the need.

4. Household Operations

This includes cleaning supplies, replacement of ordinary household supplies and equipment, etc., and the amount shown in the Budget Schedule represents the minimum need for every individual unless his living plan is such that he has no responsibility for providing these items as is the case of one who pays board and room. There may occasionally be special needs in connection with household operations, and when the minimum amount as shown in the Budget Schedule is inadequate, the need for special items may be included as a special need. (See Sec. 155-50.)

5. Clothing

This covers minimum need for purchase of new clothing and for clothing renovation. If the clothing needs of the individual require a greater amount than shown in the Budget Schedule, additional need, if established as provided in Sec. 155-50, may be included as a special item of need.

(Section Continued on Next Page)

155-25 (Continued)

Page 3 of 155-25

The Budget Schedule is reviewed semi-annually, and revised when necessary. The schedule shall be used in each county. The amounts allowed for the various items for which a specific figure is set are based on an average of pricings throughout the State. They are mandatory unless different amounts have been determined on the basis of a pricing plan approved by the SDSW, except that the amounts for utilities may be those as paid, or the amounts set forth in the budget schedule. When the facts in the individual case establish that the need (not the want) of the recipient requires a larger amount than that shown in the Budget Schedule, the increased amount so determined may be included in the budget: (See "Explanation of Items of Need in Budget Schedule" in this section)

Only those items which represent the need of the individual recipient shall be included in his budget. For example, if the recipient has no expense for garbage removal, this item would be omitted from his budget. The Budget Schedule does not include a specific figure for special items of need. Any special items of need on the part of the individual would be included under "Special Needs" in his budget. These would fall largely in the category of special needs as set forth in Sec. 155-50, Definition and Determination of Special Needs in OAS. (W&IC 2021.01, 2140)

EXPLANATION OF ITEMS OF NEED IN BUDGET SCHEDULE:

1. Food

The smaller amount shown in the Budget Schedule represents the food allowance when the recipient has his meals at home, either alone or with a household group. The larger amount represents the food allowance when all meals are purchased in restaurants. If a physician has recommended a special diet and the cost is determined to be in excess of the amount allowed for food in the Budget Schedule, the excess is considered a "Special Need". (See Sec. 155-50, for information regarding special diets.)

When a recipient pays a stipulated amount for board, or pays for board and room, the amount of this item of need is the amount as paid.

2. Housing

A specific amount for the housing item is not set. Allowance is made on the basis of the recipient's living arrangement.

- (a) If the recipient pays rent, his housing need is the amount paid for rent. If two or more persons share the same quarters, the recipient's prorated share is his housing need.
- (b) If the recipient receives free rent, the estimated value of such free housing, as determined by the county, represents the amount of housing need. While due regard may be given to the actual value of such housing, the evaluation shall take into consideration the worth of the housing to one who has only limited funds available for his needs.

(Section Continued on Next Page)

155-25 (Continued)

Page 6 of 155-25

Example B: A single recipient lives in his own home, assessed value \$800. Taxes average \$3 per month, and a street assessment, required payments on which average \$1.05 per month, represents the only encumbrance. Upkeep is \$2 per month. He has no special needs. He receives OASI in the amount of \$10 per month.

<u>Total Need</u>		<u>Income</u>	
Food	\$19.25	Net value of	
Housing		occupancy	\$ 2.95 (\$4 less \$1.05)
Taxes	3.00	OASI	<u>10.00</u>
Assessment	1.05		\$12.95
Upkeep	2.00		
Net value of occupancy	2.95	* * * *	
Electricity	1.20		
Gas	1.85	Total need	\$54.30
Water	1.40	Total income	<u>12.95</u>
Household operations	3.50	Budget	
Clothing	5.10	deficiency	\$41.35
Incidentals	10.00		
Transportation	<u>3.00</u>	Grant \$41.35 or \$42.00	
	\$54.30		

Example C: A couple, each receiving OAS, live in their own encumbered home assessed at \$1000. Taxes average \$6 a month, required monthly payments on the total encumbrance are \$12. Upkeep is \$2 a month. The couple state their monthly utility needs are, electricity \$2.60, gas \$3.50, water \$1.50. The husband receives \$20 a month veteran's pension. Necessary medical care for the wife costs \$5 a month. The budget for the husband is as follows:

<u>Total Need</u>			
Food	\$19.25	Net value of occupancy	None
Housing		Veteran's pension after	
Taxes	\$ 6.00	allowing $\frac{1}{2}$ for wife	<u>\$10.00</u>
Encumbrance	12.00		\$10.00
Upkeep	<u>2.00</u>	* * * *	
$\frac{1}{2}$ of	\$20.00		
Net value of occupancy*	None	Total need	\$54.65
Utilities**		Total income	<u>10.00</u>
Elec.	\$ 2.60	Budget deficiency	\$44.65
Gas	3.50		
Water	<u>1.50</u>		
$\frac{1}{2}$ of	\$ 7.60	Grant \$44.65 or \$45.00	
Household operations	3.50		
Clothing	5.10		
Incidentals	10.00		
Transportation	<u>3.00</u>		
	\$54.65		

(Section Continued on Next Page)

155-25 (Continued)

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6. Incidentals - Personal Needs

This item includes a wide variety of expenditures, as determined by the individual's personal habits and needs; for instance, hair cuts, toothbrushes and dentrifice, home medicine cabinet supplies, insurance, recreation, newspaper, community activities, etc. The amount shown in the Budget Schedule shall be included as the need of each recipient.

7. Transportation

This is for ordinary transportation needs. There may be occasions in which the actual need (not the want) of the recipient requires a greater amount, and when this is established the amount required is allowed.

There may be recipients who, because of their physical condition, have little use for transportation as such, but in lieu thereof require extra messenger and delivery service. In the rare case in which there is no need for transportation or for services in lieu thereof this item is omitted.

8. Special Needs

In addition to the items specifically set forth in the Budget Schedule, there may be other requirements of the individual such as those indicated in Sec. 155-50, i.e., medical care, dentures, etc. (W&IC 2140)

EXAMPLES OF DETERMINATION OF GRANT BY MEANS OF BUDGET SCHEDULE:

Example A: A single recipient living alone pays rent of \$20 a month. Rent includes water and garbage removal but does not include other utilities. Gas for cooking costs on an average of \$2.35 per month. The recipient has to buy wood for heating at an average cost of \$3.25 a month. He has no special needs. His only income is \$10 a month contribution from a son.

<u>Total Need</u>		<u>Income</u>	
Food	\$19.25	Contribution from son	\$10.00
Rent	20.00		
(including water)		* * * *	
Electricity	1.20		
Gas	2.35	Total need	\$67.65
Wood for heating	3.25	Total income	10.00
Household operations	3.50	Budget deficiency	\$57.65
Clothing	5.10		
Incidentals	10.00	Grant	\$50.00
Transportation	3.00		
	\$67.65		

(Section Continued on Next Page)

155-25 (Continued)

Page 8 of 155-25

At the expiration of a four-month period, aid must be reduced as the need for dentures no longer exists. If other conditions remain the same, and the need for medical care continues, his total need according to the budget method will then be \$60.35 instead of \$75.35. The grant is adjusted as follows:

Total need	\$60.35
Total income	<u>29.00</u>
Budget deficiency	\$31.35

Grant \$31.35 or \$32.00

Example E: A couple, both recipients, live in a three-room rear cottage on property owned by them. There is a five-room house on the same lot which is rented for \$40 a month. The water bill for both houses is \$4 a month and is paid by the couple. The total property is mortgaged, the required monthly payments being \$24, of which amount \$16 is interest and the balance is payment on the loan. The property is assessed at \$1800 and taxes average \$12 a month. The couple state their monthly utility needs are electricity, \$5.30 (used for lights and cooking). There are no special needs. Each spouse receives a \$10 contribution from a son. The budget for each spouse will be the same and is computed as follows:

<u>Total Need</u>		<u>Income</u>	
Food	\$19.25	Net value of occupancy	None
Housing*		Contribution from son	\$10.00
Net value of occupancy**	None	$\frac{1}{2}$ Net from rental***	<u>4.91</u>
Taxes	\$ 4.50		\$14.91
Encumbrance	9.00	Total need	\$52.00
Upkeep	<u>2.00</u>	Total income	<u>\$14.91</u>
$\frac{1}{2}$ of	\$15.50	Budget Deficiency	\$37.09
Utilities			
Electricity	5.30		
Water ($\frac{3}{8}$ x \$4.00)	<u>1.50</u>		
$\frac{1}{2}$ of	\$ 6.80		
Household operations	3.50		
Clothing	5.10		
Incidentals and personal needs	10.00		
Transportation	<u>3.00</u>		
	\$52.00		

Grant \$37.09 or \$38.00

*Since there are five rooms in the front house and three in the rear cottage the expenses of ownership on the property occupied is based on $\frac{3}{8}$ of the taxes, encumbrances, etc.

(Section Continued on Next Page)

155-25 (Continued)

Page 7 of 155-25

*To arrive at net value of occupancy (SEE SEC. 152-10, OCCUPANCY VALUE OF HOMES OWNED BY RECIPIENTS) deduct from the table value the recipient's share of the encumbrance payment. In this case the recipient's share of the encumbrance payment eliminates value of occupancy.

**The prorated share of utilities is allowed for each of the couple in computing his total need and each recipient fills in the affidavit at the bottom of the Budget Work Sheet (Form Ag 241) as to the amount of his share of the utilities for the household. (SEE SEC. 155-26, FORM AG 241, BUDGET WORK SHEET, AND INSTRUCTIONS FOR USE.)

The need of the wife is the same as that of her husband except that she has an additional need of \$5 per month for medical care. Therefore, her total need is \$54.65 plus \$5 or \$59.65, and her grant is determined as follows:

Total Need

\$59.65

Income

Net value of occupancy None
 $\frac{1}{2}$ of Veteran's pension
 received by husband \$10.00

* * * *

Total need	\$59.65
Total income	10.00
Budget deficiency	\$49.65

Grant \$49.65 or \$50.00

Example D: A single recipient earns \$15.00 and in addition receives free rent and utilities in a rear cottage owned by a sister. The county has determined the value of free rent and utilities to be \$14 a month. There is no other income. The recipient has need for dentures and has made arrangements to purchase them, paying \$15 a month for four months. He also requires regular medical care which costs \$5.50 a month.

Total Need

Food	\$19.25
Rent and Utilities	14.00
Household operations	3.50
Clothing	5.10
Incidentals	10.00
Transportation	3.00
Dentures	15.00
Medical Care	5.50
	<u>\$75.35</u>

Income

Value of free rent and utilities	\$14.00
Earnings	15.00
Total income	<u>\$29.00</u>
* * * *	
Total need	\$75.35
Total income	29.00
Budget deficiency	<u>\$46.35</u>

Grant \$46.35 or \$47.00

(Section Continued on Next Page)

155-26 (Continued)

155-26

1. Food (Leave blank if board and room is paid.)

From the Budget Schedule enter the amount for food in accord with the recipient's living plan, i.e., the smaller amount if living alone or as a member of a household group, and the larger amount if eating all meals in restaurants. No verification of the amount is required and no entry is necessary in the "How Verified" column. If the recipient takes his meals on a board basis, or pays for board and room, enter the amount as paid. Verification shall be made, either through receipts in the recipient's possession, by his personal affidavit, or otherwise, and the method used is indicated in the "How Verified" column.

If the recipient pays board and room, leave the "Food" item blank, and also leave blank all other items above Item 5, "Board and Room." (See instructions for Item 5.)

2. Housing (Leave blank if board and room is paid.)

If the recipient lives in other than his own property, enter the rental paid or his prorated share if two or more persons share the same quarters. The amount shall be verified, either through receipts or the recipient's personal affidavit or otherwise, and the method of verification entered in the "How Verified" column.

If free rent is contributed by another, enter the estimated value as determined by the county. Enter "worker's evaluation" or some other appropriate statement in the "How Verified" column.

If the recipient lives in a home which he alone owns, complete the appropriate items for costs of ownership, including a \$2 allowance for upkeep. If there is a net value of occupancy under the provisions of Sec. 152-10, Net Income from Real Property, enter this amount also. If there is no net value of occupancy, enter "none" for this item. Record the total expenses of ownership and net occupancy value, if any.

When the recipient has an interest in the home with other persons, his prorated share of the expenses of ownership shall be shown, i.e., if home owned with wife, one-half of the expenses of ownership is entered; if owned jointly by three persons, one-third of the expenses of ownership is entered. (The value of occupancy, if any, is based on the total assessed value of the home.)

In the "How Verified" column, indicate the method by which taxes, encumbrances, etc., were verified, i.e., tax receipts, mortgage books, etc.

3. Utilities (Leave blank if board and room is paid.)

Enter the average amount as paid for the particular utility, or the amount shown in the Budget Schedule, in the appropriate space. When there is no need for the particular utility enter "none". If an amount is

(Section Continued on Next Page)

155-25 (Continued)

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**Value of occupancy of rear cottage is based on the occupancy table for $\frac{3}{8}$ of the total assessed value of the whole property (Sec. 152-10) less each spouse's share of $\frac{3}{8}$ of the required encumbrance payment.

***From the \$40 rental deduct $\frac{5}{8}$ of the taxes, $\frac{5}{8}$ of the interest (no deduction for principal payment), upkeep (determined according to formula, see Sec. 152-00), and $\frac{5}{8}$ of the water bill which the couple pay for the total property. Since the income property is community property, each spouse has one-half of the net income.

Example F: A recipient in feeble physical condition pays \$45 per month board and room in a rest home, where all services are provided. He is unable to leave the house, and has no need of transportation. He has income of \$21 per month from OASI benefits.

Total Need

Board and room	\$45.00	OASI	\$21.00
Clothing	5.10		
Incidentals	<u>10.00</u>	* * * *	
	\$60.10	Total need	\$60.10
		Total income	<u>21.00</u>
		Budget deficiency	\$39.10
		Grant	\$39.10

155-26 FORM AG 241, BUDGET WORK SHEET, AND INSTRUCTIONS FOR USE
OAS

155-26

In all cases in which the amount of the grant is determined on the basis of total need as established by the budget method, the case record shall include Budget Work Sheet (Form Ag 241), on which shall be recorded the full detail of the budget, the source and amount of income to be applied toward total need, and the verifications. Casual income and exempt agricultural income are not considered in determining the grant of aid and shall not be entered on Form Ag 241. (SEE SEC. 150-60, RECORDING OF CASUAL INCOME AND INCONSEQUENTIAL RESOURCES.)

GENERAL INSTRUCTIONS:

The budget work sheet will ordinarily be completed in long hand and shall be retained in the county record. Complete the identifying data in the upper right hand corner, and indicate if the recipient is living as a member of a household. If so, enter the number of individuals in the household.

ITEMS OF NEED AND HOW VERIFIED:

See Sec. 155-25, Total Need -- Determination by Budget, for the Budget Schedule and explanation of the various items in the budget.

(Section Continued on Next Page)

MAIN OFFICE
SACRAMENTO
616 K STREET
(14)

LOS ANGELES OFFICE
WASHINGTON BUILDING
311 SOUTH SPRING STREET
(13)

SAN FRANCISCO OFFICE
DAVID HEWES BUILDING
995 MARKET STREET
(3)

Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES M. WOLLENBERG

DIRECTOR

Sacramento 14
December 1, 1944

SOCIAL WELFARE BOARD
BEN KOENIG, CHAIRMAN
1680 NORTH VINE STREET
LOS ANGELES

MRS. MARY E. BARKWILL
ROUTE 1, BOX 55
LINDSAY

JOHN C. CUNEO
922 J STREET
MODESTO

WILFORD H. HOWARD
1815 REDWOOD HIGHWAY SOUTH
SANTA ROSA

GERALD C. KEPPEL
135 NORTH BRIGHT AVENUE
WHITTIER

JOHN T. MARTIN
1170 SEVENTH AVENUE
SAN DIEGO

MRS. JESSIE S. WILLIAMSON
2816 OAK KNOLL TERRACE
BERKELEY

Hon. Frank M. Jordan
Secretary of State
Room 109, State Capitol
Sacramento, California

IN REPLY PLEASE REFER
TO:

Dear Mr. Jordan:

Attached are three copies of regulations, currently effective, made by the State Department of Social Welfare.

These regulations are filed in accordance with Article 21 of Chapter 3 of Title 1 of Part 3 of the Political Code as amended by Chapter 628, Statutes of 1941.

Very sincerely yours,

Charles M. Wollenberg
CHARLES M. WOLLENBERG, Director
Department of Social Welfare

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MAIN OFFICE
616 K Street
Sacramento

LOS ANGELES OFFICE
Washington Building
311 South Spring Street

SAN FRANCISCO OFFICE
David Hewes Building
995 Market Street

Earl Warren
Governor

STATE OF CALIFORNIA

Department of Social Welfare

CHARLES M. WOLLENBERG
DIRECTOR

Sacramento
December 1, 1944

1299

MANUAL LETTER NO. 69

The attached manual revisions are to be entered in your copy of the Manual of Policies and Procedures and the revision numbers cancelled on the separators for the revised chapters. Revision numbers are listed for the four chapters as follows:

Classification	Revisions 7 through 15
Applications	Revision 29
Investigation and Decision	Revision 36
Continuing Service	Revisions 33 and 34

These revisions were approved by the Social Welfare Board on November 20, 1944.

The attached manual sections present a restatement of existing policies and some new policy material on CIF (Child of Incapacitated Father) and TBF (Child of Tuberculous Father) classifications under the Aid to Needy Children program. Two new sections have been added to the manual: Secs. 195-05, Instructions for Completion of Report on Tuberculous Father (TBF), Form CA 242, and 196-05, Instructions for Completion of Report on Incapacitated Father (CIF) Form CA 240.

Some of the significant changes in policy and procedure are discussed in the following paragraphs under the manual section indicated.

In Sec. 195-00, Classification of Child of Tuberculous Father (TBF), under the sub-heading of ESTABLISHMENT OF ELIGIBILITY UNDER TBF CLASSIFICATION, Item C, Periodic Medical Reports on Tuberculous Father in Home, refers to the 90-day intervals between medical reports, and adds the provision that the intervals for examination may be extended beyond the 90 days on recommendation of the physician. The medical form, Report on Tuberculous Father (Form CA 242), as revised, provides space for this information. Item D, Periodic Medical Report on Another Tuberculous Person in Home, provides that the recommendation of the physician as to date of next examination may be substituted for the 90-day provision. Note that a portion of Form CA 242 is now used in place of Form CA 224 for physician's reports on tuberculous persons other than the father in the home, thus, Form CA 224 has been obsoleted.

Initial supplies of revised Forms CA 240 and CA 242 are being sent under separate cover to the county welfare departments.

In Sec. 195-00, under the sub-heading of GAINFUL WORK (EMPLOYMENT) UNDER TBF CLASSIFICATION, item A, Definition of Gainful Work, a clarification has been made to assist

in the administration of the TBF classification. The first paragraph provides that the father is considered gainfully employed if he earns "for more than two consecutive months an amount to exceed his total needs." The second paragraph of this section is new and points out that new profits from a family cooperative endeavor such as developing a project of raising chickens, milk goats, or other family enterprise are considered income to the family budget unit and need not be taken into consideration in determining whether the tuberculous father is gainfully employed.

In Sec. 195-00, under the sub-heading of EARNINGS OF FATHER UNDER TBF CLASSIFICATION, a new provision has been added to describe the adjustment procedure based upon the new definition of Gainful Work.

In Sec. 195-00 under the sub-heading of RESTORATION OF AID IN TBF CLASSIFICATION, a question on restoration of aid which has arisen rather frequently has been clarified. It provides when restoration is made within the 12-months period that a new Form CA 242 need not be obtained if the case record contains supporting evidence of eligibility obtained subsequent to discontinuance.

There have been instances where the county has learned at time of reinvestigation that the father was not to be found at the last known address, resulting in a delay in securing the necessary medical report. The provision contained in Sec. 195-00 under sub-heading ANNUAL REINVESTIGATION UNDER TBF CLASSIFICATION, item 2, gives an additional 90 days for completing the investigation in such situations.

In Sec. 195-05, Instructions for Completion of Report on Tuberculous Father (TBF), Form CA 242, it will be noted that the revised Form CA 242 now includes a section for the county worker to complete similar to "A" on Form CA 240. Form CA 242 is to be used in place of Form CA 224 for persons in the home other than the father who have tuberculosis in a non-communicable stage.

In Sec. 196-00, Classification of Child of Incapacitated Father (CIF), under the sub-heading of DEFINITION, a significant change has been made. The law provides as eligible "Children of a father who is incapacitated for gainful work by permanent physical disability" The former definition stated: "A disability which the physician is reasonably certain will continue unimproved to a degree preventing gainful employment, is considered permanent physical disability for the purpose of Aid to Needy Children." However, under the new definition included in this section, eligibility is established if the physician's statement determines that the father has a permanent physical disability and at the time of this determination is unable to engage in any occupation, or if the work the father's physical condition permits is not determined to be gainful employment.

In Sec. 196-00, under the sub-heading of ESTABLISHMENT OF ELIGIBILITY UNDER CIF CLASSIFICATION, further explanation is made regarding the acceptance of the signed statement of a physician who has completed the form on the basis of a review of medical information obtained from the Veteran's administration for the father who may be receiving domiciliary care or who is currently under treatment of the Veteran's Administration Facility.

In Sec. 196-00, under the sub-heading of EARNINGS OF FATHER UNDER CIF CLASSIFICATION, a new provision has been added to describe the adjustment procedure based upon the new definition of Gainful Work.

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THE UNIVERSITY OF CHICAGO

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In Sec. 196-00, under the sub-heading of TRIAL WORK PERIOD UNDER CIF CLASSIFICATION, the same policy provisions for a trial work period now holds for CIF cases as well as TBF cases.

In Sec. 196-00, under the sub-heading of RESTORATION OF AID IN CIF CLASSIFICATION, a question on restoration of aid which has arisen rather frequently has been clarified. It provides when restoration is made within the 12-month period that a new Form CA 240 (Report on Incapacitated Father) need not be obtained if the case record contains supporting evidence of eligibility obtained subsequent to discontinuance.

In Sec. 196-00, under the sub-heading of ANNUAL REINVESTIGATION UNDER CIF CLASSIFICATION, item 3, is included a new provision which does not require a new Form CA 240 at the time of reinvestigation if the original physician's report indicates permanent incapacity which prevents the father from engaging in any occupation and the record consistently indicated that the man's physical condition is unchanged.

In Sec. 235-80, Verification of Condition of Tuberculous Person in Home (ANC), verification of the condition of a tuberculous person other than the father in the home is now made through the use of portions of Form CA 242 (Report on Tuberculous Father) and Form CA 224 thereby becomes obsolete.

In Sec. 250-99, Forms CA 222, CA 223, and CA 224 should be marked as obsolete. The old Form CA 240 included in Sec. 250-99 should be marked as obsolete since the revised Form CA 240 is now included in Sec. 196-05. Form CA 222 has been replaced by Form CA 242, the revised copy of which now is included in Section 195-05.

The following bulletin material has been rendered obsolete: 203, 212, 222, 232.

STATEMENTS CONTAINED IN THE MANUAL TAKE PRECEDENCE
OVER SAME MATERIAL PREVIOUSLY RELEASED IN BULLETINS

195-00 (Continued)

C. Periodic Medical Reports on Tuberculous Father in Home

Where aid is granted when a father who has tuberculosis in a non-communicable stage is in the home, continued eligibility shall be established by periodic medical reports on the father's condition on Form CA 242. Such reports shall be secured at 90-day intervals unless the examining physician recommends, in writing, on the medical report form, that intervals between examinations be extended beyond the 90-day period. Such recommendation shall show the date of the next examination and the medical report on Form CA 242 shall then be secured at that time.

D. Periodic Medical Reports on Another Tuberculous Person in Home

When a person other than the father has tuberculosis in a non-communicable stage, medical reports on Form CA 242 (completing questions under Sec. A, 1 thru 4, and Sec. B, 1 thru 4) shall be secured at regular 90-day intervals, unless the examining physician recommends, in writing, on the medical report form, that the intervals between examinations be extended beyond the 90-day period. If such a recommendation is made, the next report shall be secured on the date of the next examination as given by the physician.

GAINFUL WORK (EMPLOYMENT) UNDER TBF CLASSIFICATION

When the physician reports that the father may safely undertake employment, it is the responsibility of the county to determine whether the work he can undertake, as reported by the physician, is gainful employment. (SEE SEC. 195-05, INSTRUCTIONS FOR COMPLETION OF REPORT ON TUBERCULOUS FATHER (TBF), FORM CA 242.)

A. Definition of Gainful Work

Except as provided under the trial work period or a retraining (rehabilitation) plan (see discussion under these headings below) a father is considered to be gainfully employed if he earns for more than two consecutive months an amount to exceed his total needs, including his pro-rated share of rent, utilities, and household expenses if living in the home. (See "Establishment of Eligibility Under TBF Classification" above.)

There will be instances wherein the tuberculous father is assisted by members of his family in carrying on or developing a project such as raising chickens, or milk goats, or similar undertaking, and the medical report indicates the father is not able to undertake gainful work. Net profits from such cooperative endeavor are considered income to the family budget unit and need not be taken into consideration in determining whether the tuberculous father is gainfully employed.

(Section Continued on Next Page)

195-00 CLASSIFICATION OF CHILD OF TUBERCULOUS FATHER (TBF)
ANC

195-00

DEFINITION

A child shall be considered eligible under the classification of child of a tuberculous father when the signed statement of a licensed physician establishes that the father has pulmonary tuberculosis or any other type of tuberculosis and

1. The father is in a sanitarium or hospital, or
2. The father has tuberculosis in a communicable stage and is living outside the home under a plan of isolation, other than hospitalization, based on the recommendation of the physician, or
3. The father has tuberculosis in a non-communicable stage provided periodic medical reports are secured, and
 - a. The physician states he should refrain from employment, or
 - b. If employable, when the physician determines the number of hours of work which the father's physical condition permits and the county determines that this does not constitute gainful employment.

ESTABLISHMENT OF ELIGIBILITY UNDER TBF CLASSIFICATION

A completed Form CA 242, Report on Tuberculous Father, shall be a part of the county record in establishing eligibility under the TBF classification.

A. Father in Sanitarium or Hospital

When the father is in a sanitarium or hospital, the county shall obtain verification from the institution of the date of admission, and shall request notification when the patient leaves.

B. Periodic Medical Reports on Tuberculous Father Not in Home, Sanitarium, or Hospital

When the father is not in the home, a sanitarium, or a hospital, continued eligibility shall be established by a follow-up report from a physician on Form CA 242 at intervals of six months.

(Section Continued on Next Page)

195-00 (Continued)

195-00

RESTORATION OF AID IN TBF CLASSIFICATION

When aid has been discontinued because a tuberculous father is gainfully employed, and aid is restored within 12 months from the date of last medical report, a new medical report on Form CA 242 (Report on Tuberculous Father) need not be obtained if the case record contains supporting evidence of eligibility subsequent to discontinuance, in the form either of an oral or of a written statement from the examining physician.

ANNUAL REINVESTIGATION UNDER TBF CLASSIFICATION

Aid may not continue beyond the due date of the annual reinvestigation without a physician's report establishing continuing eligibility with the following exceptions:

1. When unsettled conditions in a foreign country make it difficult to secure medical reports on the tuberculous father, aid may be continued beyond the due date of the annual reinvestigation without the required medical form when the disability may reasonably be expected still to exist.

EXAMPLE A: IN A CASE WHERE PREVIOUS MEDICAL REPORTS HAVE SHOWN THE FATHER HAS ADVANCED TUBERCULOSIS AND LETTERS FROM THE FATHER OR RELATIVES TO HIS FAMILY INDICATE HIS CONDITION HAS NOT IMPROVED TO ANY GREAT EXTENT, IT MAY REASONABLY BE EXPECTED THAT HIS DISABILITY STILL EXISTS.

2. When the record indicates that the county has shown due diligence in an effort to secure the medical report and there is reason to believe the disability still exists, aid may be continued beyond the due date of the annual reinvestigation for a period not to exceed 90 days.
(W&IC 1500, 1560)

EXAMPLE B: IT IS KNOWN TO THE COUNTY OVER CONSIDERABLE PERIOD THAT THE TUBERCULOUS FATHER WAS LIVING WITH HIS PARENTS. AT TIME OF REINVESTIGATION IT IS LEARNED THAT HE LEFT THIS HOME AND HAS GONE TO ARIZONA TO BE WITH HIS SISTER. AID CONTINUES FOR A PERIOD NOT TO EXCEED 90 DAYS BEYOND THE DATE OF ANNUAL REINVESTIGATION TO ENABLE THE COUNTY TO SECURE THE NECESSARY MEDICAL REPORT.

195-00 (Continued)

195-00

B. Determination of Gainful Work

The county shall determine whether the work the father can undertake, if any, is gainful employment by determining the amount of earnings on the basis of the prevailing wage for the type of work and the number of hours of work the father is able to do as reported by the physician. The local USES may be consulted for types of work and prevailing wages. (See Sec. 195-05, INSTRUCTIONS FOR COMPLETION OF REPORT ON TUBERCULOUS FATHER (TBF), FORM CA 242, FOR FURTHER EXPLANATION.)

When the father is reported by the physician to be physically able to work and he is not actually working, the estimated potential earnings, established by the worker, shall be used in determining ability to undertake gainful employment. (See Sec. 195-05, INSTRUCTIONS FOR COMPLETION OF REPORT ON TUBERCULOUS FATHER (TBF), FORM CA 242)

EARNINGS OF FATHER UNDER TBF CLASSIFICATION

If the earnings of a tuberculous father exceed his needs or pro-rated share of overhead expenses for two consecutive months, the ANC grant shall be suspended for the third month until verification of earnings for that month have been made. If the earnings for the third month exceed the father's share of the budget, ineligibility exists and aid for that month is cancelled. If the earnings of the tuberculous father do not exceed his share of the budget in the third month, eligibility exists and aid for that month is paid in an amount to meet the budgetary deficiency.

TRIAL WORK PERIOD UNDER TBF CLASSIFICATION

In cases where the examining physician is unable to determine whether or not work would be harmful to the father, he may recommend in writing a trial work period in order to make such determination. ANC shall be granted up to and during such trial work period except for those months in which the father's actual earnings, together with other income, may exceed the total budgetary needs of the family. The trial work period begins at the time the patient secures a suitable type of employment as prescribed by the physician and shall not exceed 90 days without further recommendation from the physician for such extension.

PLAN FOR REHABILITATION UNDER TBF CLASSIFICATION

It may be found desirable for the father, who is unable to be gainfully employed because of his tuberculous condition, to be trained for some type of work. Aid may be granted for his children under this classification, until the father's training has been completed. If a tuberculous father receives remuneration during the period of retraining under an established vocational rehabilitation training program, ANC shall be granted during such retraining period, except for those months in which the father's actual earnings, together with other income, may exceed the total budgetary needs of the family.

(Section Continued on Next Page)

195-05 (Continued)

195-05

2. When the physician returns the form with Section B completed, the county worker applies the Code for Interpreting Physician's Report (Section C). It is the county worker's responsibility to determine whether the work the father can undertake, if any, as reported by the physician, is "gainful employment". This is done by completing the information required under Section D, Item 1, which covers:
 - a. the prevailing wage (per hour); b. number of hours father is able to work as reported by physician under Section B, Item 5 (D and E);
 - c. actual earnings (per month); d. estimated earnings (per month);
 - e. father's share of family budget; f. father's budgetary needs if not in home.

There will be cases in which the physician states the father is unable to return to his former occupation but can do "light work" although he has never done light work. The worker should then estimate his earnings on the basis of the prevailing wage for any type of light work which it is reasonable to expect he might undertake. The local USES may be consulted for types of work and prevailing wage.

It should be noted that, when the father is working, eligibility must be determined on the basis of his estimated ability to earn rather than his actual earnings except when he is actually earning more than his share of the family budget or more than enough to care for his needs if living outside the home. (W&IC 1500, 1560)

EXAMPLE A: PHYSICIAN SAYS FATHER CAN WORK 4 HOURS A DAY. WAGE FOR EMPLOYMENT IS 50¢ AN HOUR. ESTIMATED MONTHLY EARNINGS WOULD THEREFORE BE \$48 A MONTH, WHICH EXCEEDS FATHER'S SHARE OF BUDGET. FATHER ACTUALLY WORKING ONLY 2 DAYS A WEEK AND ACTUAL EARNINGS ARE LESS THAN HIS SHARE OF THE FAMILY BUDGET. CASE INELIGIBLE ON BASIS OF FATHER'S ESTIMATED EARNINGS AS BASED ON PHYSICIAN'S REPORT.

EXAMPLE B: PHYSICIAN STATES FATHER CAN WORK 2 HOURS A DAY. WAGE FOR EMPLOYMENT 35¢ AN HOUR. ESTIMATED MONTHLY EARNINGS WOULD THEREFORE BE \$16.80, WHICH IS LESS THAN THE FATHER'S SHARE OF FAMILY BUDGET. THE FATHER IS ACTUALLY WORKING 1 HOUR A DAY AND HIS ACTUAL EARNINGS ARE ONLY \$8.40. CASE ELIGIBLE ON BASIS OF FATHER'S ESTIMATED EARNINGS AS BASED ON PHYSICIAN'S REPORT.

EXAMPLE C: PHYSICIAN STATES FATHER CAN WORK 2 HOURS A DAY. WAGE FOR EMPLOYMENT 35¢ AN HOUR, ESTIMATED MONTHLY EARNINGS \$16.80, WHICH IS LESS THAN FATHER'S SHARE OF FAMILY BUDGET. THE FATHER IS ACTUALLY WORKING 4 HOURS A DAY AND HIS ACTUAL EARNINGS ARE \$33.60 PER MONTH, WHICH EXCEED HIS SHARE OF THE FAMILY BUDGET. CASE INELIGIBLE ON BASIS OF FATHER'S ACTUAL EARNINGS.

(SEE SEC. 235-80, VERIFICATION OF CONDITION OF TUBERCULOUS PERSON IN HOME, ANC, FOR INSTRUCTIONS ON THE USE OF FORM CA 242, REPORT ON TUBERCULOUS FATHER, FOR A PERSON IN THE HOME (OTHER THAN THE FATHER) WHO HAS TUBERCULOSIS IN A NON-COMMUNICABLE STAGE.)

(Section Continued on Next Page)

195-05 INSTRUCTIONS FOR COMPLETION OF REPORT ON TUBERCULOUS FATHER
(TBF), FORM CA 242
ANC

195-05

On Form CA 242 (Report on Tuberculous Father) the worker records identifying data and social information which will assist the physician in gaining a picture of the individual and his environmental situation. The physician reports the diagnosis, plan for patient, recommendation for reexamination, ability to work etc. If the physician determines that the father may safely undertake employment, he indicates his findings with regard to the father's degree of employability by stating the type of work that the father can do and number of hours his physical condition would permit him to do such work. On the basis of the Physician's Report (Section B) and the Code for Interpreting the Physician's Report (Section C) the county worker completes the determination of eligibility.

The Form CA 242 is completed as follows:

1. The county worker completes Section A on the basis of information contained in the case record and obtained from interviews with the father and the family.

Since confidential social information for the use of the physician is included on the medical report form, this form should be sent to the physician rather than giving it to the father. It is suggested that social information be given at the time of the original referral to the physician for completion of the form, and also when the father will not be seen by the same physician who completed previous medical report forms. It will not be necessary to routinely complete Section A when the father is being seen by the same physician unless a change occurs in the patient's social situation which would be of interest to the physician.

The first three items under Section A are self-explanatory. Under Item 4, Home Conditions, the worker should give a description of the physical aspects of the home which may affect the father's illness. For example: Do home surroundings permit the father to secure sufficient rest? Are adequate meals prepared? Overcrowding? Is the house cold - damp? This information will be of interest to the physician both in prescribing treatment and in making medical and social recommendations.

The questions listed under Item 5, Work History, are self-explanatory. Space has been provided under Item 6, Additional Information, for the use of the worker in supplying information regarding the patient's social situation and its effect on the patient's illness. For example: Is the family sympathetic towards the father and his illness? Does the father seem to have made a good adjustment? Does he worry about himself? Is he discouraged? Irritable? Does he follow medical recommendations?

(Section Continued on Next Page)

195-05 (Continued)

195-05

Form CA 242 (Reverse)

B. PHYSICIAN'S REPORT (CONTINUED)

5. EMPLOYABILITY

- A. DO YOU RECOMMEND A RETRAINING PROGRAM? no
- B. BEFORE MAKING A STATEMENT ON THE EMPLOYABILITY OF THIS MAN DO YOU RECOMMEND A TRIAL WORK PERIOD OF 90 DAYS IN ORDER TO DETERMINE HIS PHYSICAL ABILITY TO WORK? YES () NO (X)
- C. SHOULD MAN REFRAIN FROM WORK ENTIRELY? YES () NO (X)
- (THE FOLLOWING QUESTIONS ARE TO BE COMPLETED IF ANSWER TO PRECEDING QUESTION IS "NO".)
- D. IS MAN'S PHYSICAL CONDITION SUCH THAT HE CAN NOW RETURN TO HIS FORMER OCCUPATION, OR WORK REQUIRING EQUAL EFFORT? YES () NO (X)
1. FULL TIME? YES () NO () 2. IF NOT FULL TIME, HOW MANY HOURS A DAY? _____
HOW MANY DAYS PER WEEK? _____
- E. IS MAN'S PHYSICAL CONDITION SUCH THAT HE CAN SAFELY UNDERTAKE LIGHT WORK? YES (X) NO ()
1. FULL TIME LIGHT WORK? YES () NO (X) 2. IF NOT FULL TIME, HOW MANY HOURS A DAY? 2 HOW MANY DAYS PER WEEK? 3

6. RECOMMENDATIONS TO COUNTY WELFARE DEPARTMENT: Hi-Caloric Diet

10/26/44
DATE OF EXAMINATION

Arthur Jones M.D.
SIGNATURE OF PHYSICIAN
10/26/44
DATE

TO BE COMPLETED AFTER PHYSICIAN'S REPORT (SECTION B) HAS BEEN COMPLETED

C. CODE FOR INTERPRETING PHYSICIAN'S REPORT

UNDER QUESTION 5

1. IF "C" IS "YES" -- ELIGIBLE
2. IF "C" IS "NO" -- THEN QUESTIONS "D" OR "E" MUST BE COMPLETED.
3. IF "D (1)" IS "YES" -- INELIGIBLE
4. IF "D (2)" IS ANSWERED -- WORKER SHOULD ESTIMATE EARNINGS ON BASIS OF THE NUMBER OF HOURS AND DAYS INDICATED AND THE PREVAILING WAGE FOR TYPE OF WORK.
5. IF "E (1)" IS "YES" -- INELIGIBLE
6. IF "E (2)" IS "ANS." -- WORKER SHOULD ESTIMATE EARNINGS ON BASIS OF THE NUMBER OF HOURS AND DAYS INDICATED AND THE PREVAILING WAGE FOR TYPE OF WORK.

D. GAINFUL EMPLOYMENT DETERMINATION

1. IF FATHER IS WORKING OR, ACCORDING TO PHYSICIAN'S REPORT, IS ABLE TO UNDERTAKE ANY EMPLOYMENT, COMPLETE THE FOLLOWING:
 - A. PREVAILING WAGE 50¢
PER HOUR
 - B. NUMBER OF HOURS ABLE TO WORK (AS PER SECTION B, ITEM 5 (D AND E)) 6 hrs. a week
 - C. ACTUAL EARNINGS _____
PER MONTH
 - D. ESTIMATED EARNINGS \$12
PER MONTH
 - E. FATHER'S SHARE OF FAMILY BUDGET \$30.25
 - F. FATHER'S BUDGETARY NEEDS IF NOT IN HOME \$ _____

(NOTE: IF THE ESTIMATE OF THE FATHER'S EARNINGS ON THE BASIS OF THE PHYSICIAN'S DETERMINATION OF THE NUMBER OF HOURS HE CAN WORK EXCEEDS HIS SHARE OF THE FAMILY BUDGET OR HIS NEEDS IF LIVING OUT OF THE HOME, CASE IS INELIGIBLE EVEN THOUGH THE FATHER IS ACTUALLY WORKING LESS THAN THE NUMBER OF HOURS DETERMINED BY THE PHYSICIAN.)

2. ON THE BASIS OF THE ABOVE INFORMATION Oswald Doe
NAME OF FATHER
IS X TO UNDERTAKE GAINFUL EMPLOYMENT, AND HIS CHILDREN ARE X
ABLE UNABLE ELIGIBLE INELIGIBLE
FOR ANC UNDER THE TBF CLASSIFICATION.

10/28/44
DATE

Mary Smith
SIGNATURE OF COUNTY WORKER

195-05 (Continued)

195-05

FORM CA 242, REVISED NOVEMBER, 1944
STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE

REPORT ON TUBERCULOUS FATHER
AID TO NEEDY CHILDREN

FORM CA 242

UNDER THE AID TO NEEDY CHILDREN LAW, A CHILD WHOSE FATHER "IS SUFFERING FROM TUBERCULOSIS IN SUCH A STAGE THAT HE CAN NOT PURSUE A GAINFUL OCCUPATION" SHALL BE CONSIDERED AS ELIGIBLE UNDER THE CLASSIFICATION "TUBERCULOUS FATHER (TBF)" PROVIDED THE CHILD IS OTHERWISE ELIGIBLE.

A. MEDICAL SOCIAL WORKER OR COUNTY WORKER'S REPORT (TO BE SUBMITTED TO PHYSICIAN BEFORE EXAMINATION)

1. NAME OF PATIENT Doe, Oswald AGE 40
2. HOME ADDRESS 1012 - Sutter Street, Sacramento
3. PRESENT WHEREABOUTS at home
4. HOME CONDITIONS: Separate bedroom for father. Good ventilation and heating.
Wife prepares nourishing meals.

5. WORK HISTORY:

- A. WHAT IS MAN'S USUAL OCCUPATION? Day laborer
B. HOW LONG SINCE HE HAS BEEN ABLE TO FOLLOW IT? 3 years
C. WHAT KIND OF WORK, IF ANY, HAS HE DONE SINCE ONSET OF PRESENT ILLNESS? none
D. IF MAN BELIEVES HE CAN UNDERTAKE WORK REQUIRING LIMITED PHYSICAL EFFORT, INDICATE TYPE OF WORK
none
E. IS MAN INTERESTED IN A RETRAINING PROGRAM? no WHAT TYPE? -----

6. ADDITIONAL INFORMATION Because of close family ties it appears that Mr. Doe receives encouragement and sympathetic understanding. He follows medical recommendations.

10/23/44

DATE

Mary Smith

SIGNATURE OF COUNTY WORKER

B. PHYSICIAN'S REPORT

1. THIS IS TO CERTIFY, THAT I HAVE EXAMINED THE ABOVE-NAMED PATIENT AND FIND THAT HE IS SUFFERING FROM TUBERCULOSIS IN A COMMUNICABLE/NON-COMMUNICABLE STAGE.

DIAGNOSIS: MINIMAL
MODERATELY ADVANCED
FAR ADVANCED

ACTIVE
ARRESTED

2. IF OTHER THAN PULMONARY, SPECIFY -----
3. PLAN FOR PATIENT. (COMPLETE SECTION UNDER THIS ITEM WHICH IS APPLICABLE.)
A. ADMITTED TO ----- ON ----- DATE -----
NAME OF SANATORIUM OR HOSPITAL
B. IF PATIENT HAS TUBERCULOSIS IN A COMMUNICABLE STAGE, AND IS NOT IN A SANATORIUM OR HOSPITAL, WHAT IS PLAN FOR ISOLATION FROM FAMILY? -----
C. IF PATIENT IS IN HOME, HIS PRESENCE X CONSIDERED A SOURCE OF DANGER TO FAMILY.
IS IS NOT
4. IF PATIENT IS NOT IN A HOSPITAL OR SANATORIUM, HOW OFTEN SHOULD HE BE EXAMINED? IN ABOUT 90 DAYS
GIVE DATE OF NEXT EXAMINATION Feb. 1, 1945

(NOTE: PHYSICIAN'S REPORT CONTINUED ON REVERSE SIDE OF FORM)

(FOR REVERSE OF FORM SEE NEXT PAGE)

(Section Continued on Next Page)

196-00 (Continued)

196-00

may be established by a completed Form CA 240 signed by a physician who certified as to eligibility on the basis of a review of the medical information obtained from the Veterans Administration or by a completed Form CA 240 signed by a physician who has made the examination of the incapacitated father. (SEE SEC. 196-05, INSTRUCTIONS FOR COMPLETION OF REPORT ON INCAPACITATED FATHER (CIF), FORM CA 240.)

Under the regulations governing the Veterans Administration Facility, the medical staff of these hospitals are not permitted to make statements in regard to degree or permanence of incapacity. However, the medical report will be released by the Veterans Administration to the county welfare department or physician on receipt of a signed consent of the veteran.

GAINFUL WORK (EMPLOYMENT) UNDER CIF CLASSIFICATION

When the physician reports that the father may safely undertake employment, it is the responsibility of the county to determine whether the work he can undertake, as reported by the physician, is gainful employment. (SEE SEC. 196-05, INSTRUCTIONS FOR COMPLETION OF REPORT ON INCAPACITATED FATHER (CIF), FORM CA 240.)

4. Definition of Gainful Work

Except as provided under the trial work period or a retraining (rehabilitation) plan, (see discussion under these headings below) a father is considered to be gainfully employed if he earns for more than two consecutive months an amount to exceed his total needs, including his pro-rated share of rent, utilities, and household expenses if living in the home. (See "Establishment of Eligibility Under CIF Classification" above.)

(Section Continued on Next Page)

**195-10 CHILD IN HOME WITH TUBERCULOUS PERSON
ANC**

195-10

ANC may not be granted when a person who has tuberculosis in a communicable stage is living in the household. When it is discovered, after aid is granted, that a person who has tuberculosis in a communicable stage is living in the household, a plan of isolation, outside the home, shall be made as soon as possible. However, in no event shall ANC be continued beyond the end of the month following the month of such discovery. (See SEC. 235-80, VERIFICATION OF CONDITION OF TUBERCULOUS PERSON IN HOME.) (W&IC 1560)

**196-00 CLASSIFICATION OF CHILD OF INCAPACITATED FATHER (CIF)
ANC**

196-00

DEFINITION

A child shall be considered eligible under the classification of child of incapacitated father (CIF) when

The licensed physician's statement establishes that the father has a permanent physical disability and at the time of this determination

- a. The father is unable to engage in any occupation, or
- b. The number of hours of work which the father's physical condition permits as determined by the physician does not constitute gainful employment. (See SEC. 196-05, INSTRUCTIONS FOR COMPLETION OF REPORT ON INCAPACITATED FATHER (CIF), FORM CA 240.)

ESTABLISHMENT OF ELIGIBILITY UNDER CIF CLASSIFICATION

A completed Form CA 240, Report on Incapacitated Father (CIF) shall be a part of the county record in establishing eligibility under the CIF classification.

If the incapacitated father is receiving domiciliary care, or is currently under treatment of the Veterans Administration Facility, eligibility to ANC

(Section Continued on Next Page)

196-00 (Continued)

196-00.

PLAN FOR REHABILITATION UNDER CIF CLASSIFICATION

It may be found desirable for the father, who is unable to be gainfully employed because of his permanent physical incapacity, to be trained for some type of work. Aid may be granted for his children under this classification, until the father's training has been completed. If an incapacitated father receives remuneration during the period of retraining under an established vocational rehabilitation training program, ANC shall be granted during such retraining period, except for those months in which the father's actual earnings, together with other income, may exceed the total budgetary needs of the family.

RESTORATION OF AID IN CIF CLASSIFICATION

When aid has been discontinued because an incapacitated father is gainfully employed, and aid is restored within 12 months from the date of the last medical report, a new report on Form CA 240 (Report on Incapacitated Father) need not be obtained if the case record contains supporting evidence of eligibility subsequent to discontinuance in the form either of an oral or of a written statement from the examining physician.

ANNUAL REINVESTIGATION UNDER CIF CLASSIFICATION

Aid may not continue beyond the due date of the annual reinvestigation without a physician's report establishing continuing eligibility with the following exceptions:

1. When unsettled conditions in a foreign country make it difficult to secure medical reports on the incapacitated father, aid may be continued beyond the due date of the annual reinvestigation without the required medical form when the disability may reasonably be expected still to exist.

EXAMPLE A: THE CASE RECORD CONTAINS MEDICAL REPORTS AND OTHER EVIDENCE SHOWING THE FATHER HAS A SERIOUS HEART CONDITION AND HE HAS BEEN DECLARED PERMANENTLY INCAPACITATED. LETTER FROM THE FATHER OR RELATIVES TO HIS FAMILY INDICATE HIS CONDITION HAS NOT IMPROVED AND ACTIVITY CONTINUES TO BE LIMITED. UNDER SUCH CIRCUMSTANCES IT MAY REASONABLY BE EXPECTED THAT HIS DISABILITY STILL EXISTS.

(Section Continued on Next Page)

196-00 (Continued)

196-00

There will be instances wherein the incapacitated father is assisted by members of his family in carrying on or developing a project such as raising chickens, or milk goats, or similar undertaking, and the medical report indicates the father is not able to undertake gainful work. Net profits from such cooperative endeavor are considered income to the family budget unit and need not be taken into consideration in determining whether the incapacitated father is gainfully employed.

B. Determination of Gainful Work

The county shall determine whether the work the father can undertake, if any, is gainful employment by determining the amount of earnings on the basis of the prevailing wage for the type of work and the number of hours of work the father is able to do as reported by the physician. (See Sec. 196-05, INSTRUCTIONS FOR COMPLETION OF REPORT ON INCAPACITATED FATHER (CIF), FORM CA 240.)

When the father is reported by the physician to be physically able to work and he is not actually working, the estimated potential earnings, established by the worker, shall be used in determining ability to undertake gainful employment.

EARNINGS OF FATHER UNDER CIF CLASSIFICATION

If the earnings of an incapacitated father exceed his budgetary needs including his prorated share of overhead expenses for two consecutive months, the ANC grant shall be suspended for the third month until verification of earnings for that month have been made. If the earnings for the third month exceed the father's share of the budget, ineligibility exists and aid for that month is cancelled. If the earnings of the incapacitated father do not exceed his share of the budget in the third month, eligibility exists and aid for that month is paid in an amount to meet the budgetary deficiency.

TRIAL WORK PERIOD UNDER CIF CLASSIFICATION

In cases where the examining physician is unable to determine whether or not work would be harmful to the father, he may recommend in writing a trial work period in order to make such determination. ANC shall be granted during such trial work period except for those months in which the father's actual earnings, together with other income, may exceed the total budgetary needs of the family. The trial work period begins at the time the patient secures a suitable type of employment as prescribed by the physician and shall not exceed 90 days without further recommendation from the physician for such extension.

(Section Continued on Next Page)

196-05 INSTRUCTIONS FOR COMPLETION OF REPORT ON INCAPACITATED FATHER
(CIF), FORM CA 240
ANC

196-05

On Form CA 240 (Report on Incapacitated Father) the worker records relevant social information which will assist the physician in gaining a picture of the individual and his environmental situation. This information will be of value to the physician in making medical and social recommendations. The physician reports the diagnosis, permanence of incapacity, type of work, if any, that the father can do and number of hours that his physical condition would permit him to do such work. On the basis of the Physician's Report (Section B) and the Code for Interpreting Physician's Report (Section C) the county worker completes the determination of eligibility.

The Form CA 240 is completed as follows:

1. The county worker completes Section A on the basis of information contained in the case record and obtained from interviews with the family and the father.
2. The Form CA 240 is sent to the physician for completion of Section B. On the form a space, Item 3, has been provided for the physician's use in making recommendations which the county welfare department may be instrumental in carrying out. For example, the physician may recommend a different type of housing, special diet, prosthetic appliances, etc. It should be noted that, if the physician answers Item 7 "No" he should then also complete Item 8, which describes the degree of father's employability.

(Section Continued on Next Page)

196-00 (Continued)

196-00

2. When the record indicates that the county has shown due diligence in an effort to secure the medical report and there is reason to believe the disability still exists, aid may be continued beyond the due date of the annual reinvestigation for a period not to exceed 90 days.

EXAMPLE B: IT IS KNOWN TO THE COUNTY OVER CONSIDERABLE PERIOD THAT THE INCAPACITATED FATHER WAS LIVING WITH HIS PARENTS. AT TIME OF REINVESTIGATION IT IS LEARNED THAT HE LEFT THIS HOME AND HAS GONE TO ARIZONA TO BE WITH HIS SISTER. AID CONTINUES FOR A PERIOD NOT TO EXCEED 90 DAYS BEYOND THE DATE OF ANNUAL REINVESTIGATION TO ENABLE THE COUNTY TO SECURE THE NECESSARY MEDICAL REPORT.

3. When the original physician's report indicates permanent incapacity which prevents the father from engaging in any occupation and the record consistently indicates that his physical condition is unchanged.
(W&IC 1500, 1560)

EXAMPLE C: THE FATHER HAS BEEN DECLARED PERMANENTLY INCAPACITATED AFTER AN INJURY WHICH RESULTED IN A PARALYSIS. THE FATHER IS BEDFAST AND THE PHYSICIAN REPORTED THAT NO IMPROVEMENT COULD BE EXPECTED. THE WORKER SEES THE FATHER DURING HOME VISITS AND OTHER MEMBERS OF THE FAMILY REPORT ON THE FATHER'S CONDITION AT DIFFERENT TIMES. ALL OF THIS INFORMATION IS NOTED IN THE CASE RECORD AND INDICATES THE FATHER'S CONDITION REMAINS UNCHANGED.

196-05 (Continued)

196-05

There will be cases in which the physician states father is unable to return to his former occupation but can do "light work" although he has never done light work. The worker should then estimate the father's earnings on the basis of the prevailing wage for any type of light work which it is reasonable to expect he might undertake. The local USES may be consulted for types of work and prevailing wage.

It should be noted that when the father is working eligibility must be determined on the basis of his estimated ability to earn rather than his actual earnings except when he is actually earning more than his share of the family budget or more than enough to care for his needs if living outside the home. (W&IC 1500, 1560)

EXAMPLE A: PHYSICIAN SAYS FATHER CAN WORK 4 HOURS A DAY. WAGE FOR EMPLOYMENT IS 50¢ AN HOUR. ESTIMATED MONTHLY EARNINGS WOULD THEREFORE BE \$48 A MONTH, WHICH EXCEEDS FATHER'S SHARE OF BUDGET. FATHER ACTUALLY WORKING ONLY 2 DAYS A WEEK AND ACTUAL EARNINGS ARE LESS THAN HIS SHARE OF THE FAMILY BUDGET. CASE INELIGIBLE ON BASIS OF FATHER'S ESTIMATED EARNINGS AS BASED ON PHYSICIAN'S REPORT.

EXAMPLE B: PHYSICIAN STATES FATHER CAN WORK 2 HOURS A DAY. WAGES FOR EMPLOYMENT 35¢ AN HOUR. ESTIMATED MONTHLY EARNINGS WOULD THEREFORE BE \$16.80, WHICH IS LESS THAN FATHER'S SHARE OF FAMILY BUDGET. FATHER IS ACTUALLY WORKING 1 HOUR A DAY AND HIS ACTUAL EARNINGS ARE ONLY \$8.40. CASE ELIGIBLE ON BASIS OF ESTIMATED EARNINGS AS BASED ON PHYSICIAN'S REPORT.

EXAMPLE C: PHYSICIAN STATES FATHER CAN WORK 2 HOURS A DAY. WAGE FOR EMPLOYMENT 35¢ AN HOUR, ESTIMATED MONTHLY EARNINGS \$16.80, WHICH IS LESS THAN FATHER'S SHARE OF FAMILY BUDGET. FATHER IS ACTUALLY WORKING 4 HOURS A DAY AND HIS ACTUAL EARNINGS ARE \$33.60 PER MONTH, WHICH EXCEED HIS SHARE OF THE FAMILY BUDGET. CASE INELIGIBLE ON BASIS OF THE FATHER'S ACTUAL EARNINGS.

(Section Continued on Next Page)

196-05 (Continued)

196-05

3. Since confidential social information for the use of the physician is included on the medical report form, it is desirable to send the form to the physician rather than giving it to the father.

It is suggested that social information be given at the time of the original referral to the physician for completion of the form, and also when the father will not be seen by the same physician who completed previous medical report forms. It will not be necessary to routinely complete Section A when the father is being seen by the same physician unless a change occurs in the patient's social situation which would be of interest to the physician.

The first three items under Section A are self-explanatory. Under Item 4, Home Conditions, the worker should give a brief picture of the physical aspects of the home which may affect the father's illness. For example: Do home surroundings permit the father to secure sufficient rest? Are adequate meals prepared? Overcrowding? Is the house cold - damp? This information will be of interest to the physician both in prescribing treatment and in making medical and social recommendations. The physician may recommend different housing for a cardiac patient so that he would not have to climb stairs and where he could have a separate room to secure sufficient bed rest.

Questions under Item 5, Work History, are self-explanatory. Space provided under Item 6, Additional Information, is for the use of the worker in furnishing the physician pertinent information regarding the patient's social situation and its effects on the patient's illness. For example: Is the family sympathetic towards the father and his illness? Does the father seem to have made a good adjustment? Does he worry about himself? Is he discouraged? Irritable? Does he follow medical recommendations?

4. When the physician returns the form with Section B completed, the county worker applies the Code for Interpreting Physician's Report (Section C). It is the county worker's responsibility to determine whether the work the father can undertake, if any, as reported by the physician, is "gainful employment". This is done by completing the information required under Section D, Item 1, which covers: a. the prevailing wage (per hour); b. number of hours father is able to work as reported by physician (under Section B, Item 8); c. actual earnings per month; d. estimated earnings per month; e. father's share of family budget; f. father's budgetary need, if not in home.

(Section Continued on Next Page)

196-05 (Continued)

196-05

FORM CA 240 (Reverse)

B. PHYSICIAN'S REPORT

1. DATE OF EXAMINATION: 10/24/44
2. DIAGNOSIS AND SYMPTOMS CAUSING INCAPACITY: Buergers Disease
3. RECOMMENDATIONS TO COUNTY WELFARE DEPARTMENT: Continue present treatment at general hospital clinic
4. WOULD YOU ADVISE A RETRAINING PROGRAM? YES () NO (X)
5. BEFORE MAKING A STATEMENT ON THE EMPLOYABILITY OF THIS MAN DO YOU RECOMMEND A TRIAL WORK PERIOD OF 90 DAYS IN ORDER TO DETERMINE HIS PHYSICAL ABILITY TO WORK? YES () NO (X)
6. IN YOUR OPINION, DO YOU CONSIDER THAT HIS PHYSICAL INCAPACITY IS A PERMANENT DISABILITY? YES (X) NO ()
7. IN YOUR OPINION, IS HIS PHYSICAL INCAPACITY SUCH AS TO PREVENT HIM FROM ENGAGING IN ANY OCCUPATION AT THIS TIME? YES () NO (X)
- TO BE COMPLETED IF ANSWER TO QUESTION 7 IS "NO"
8. EMPLOYABILITY: IN YOUR JUDGMENT, AND AS FAR AS IT IS POSSIBLE TO ASCERTAIN AT THIS TIME, IS MAN PHYSICALLY ABLE TO?
- A. RETURN TO HIS FORMER EMPLOYMENT OR WORK REQUIRING EQUAL EFFORT? YES () NO (X)
1. FULL TIME? YES () NO () 2. IF NOT FULL TIME, HOW MANY HOURS PER DAY? _____ NUMBER OF DAYS PER WEEK? _____
- B. DO LIGHT WORK? YES (X) NO ()
1. FULL TIME? YES () NO () 2. IF NOT FULL TIME, HOW MANY HOURS PER DAY? 2 NUMBER OF DAYS PER WEEK? 6

W. A. Wallace
SIGNATURE OF PHYSICIAN

10/24/44
DATE

C. CODE FOR INTERPRETING PHYSICIAN'S REPORT

1. IF QUESTION 6 IS "NO" (REGARDLESS OF ANSWER UNDER QUESTION 7) -- INELIGIBLE.
2. IF QUESTIONS 6 AND 7 ARE BOTH ANSWERED "YES" -- ELIGIBLE.
3. IF QUESTION 6 IS "YES" AND QUESTION 7 IS "NO" -- WORKER SHOULD ESTIMATE EARNINGS ON BASIS OF THE NUMBER OF HOURS INDICATED BY PHYSICIAN UNDER QUESTION 8.
4. IF "A (1)" IS "YES" -- INELIGIBLE.
5. IF "A (2)" IS ANSWERED -- WORKER SHOULD ESTIMATE EARNINGS ON THE BASIS OF THE NUMBER OF HOURS AND DAYS INDICATED.
6. IF "B (1)" IS "YES" -- INELIGIBLE.
7. IF "B (2)" IS ANSWERED -- WORKER SHOULD ESTIMATE EARNINGS ON THE BASIS OF THE NUMBER OF HOURS AND DAYS INDICATED AND THE PREVAILING WAGE FOR TYPE OF WORK.

D. GAINFUL EMPLOYMENT DETERMINATION

1. IF FATHER IS WORKING OR, ACCORDING TO PHYSICIAN'S REPORT, IS ABLE TO UNDERTAKE ANY EMPLOYMENT, COMPLETE THE FOLLOWING:
- A. PREVAILING WAGE 50¢ PER HOUR B. NUMBER OF HOURS ABLE TO WORK (AS PER SEC.B., ITEM 8) 12 per week
- C. ACTUAL EARNINGS _____ PER MONTH D. ESTIMATED EARNINGS 24 PER MONTH
- E. FATHER'S SHARE OF FAMILY BUDGET 28.75 F. FATHER'S BUDGETARY NEEDS IF NOT IN HOME \$ _____
- (NOTE: IF THE ESTIMATE OF THE FATHER'S EARNINGS, ON THE BASIS OF THE PHYSICIAN'S DETERMINATION OF THE NUMBER OF HOURS HE CAN WORK, EXCEEDS HIS SHARE OF THE FAMILY BUDGET OR HIS NEEDS, IF LIVING OUT OF THE HOME, CASE IS INELIGIBLE EVEN THOUGH THE FATHER IS ACTUALLY WORKING LESS THAN THE NUMBER OF HOURS INDICATED BY THE PHYSICIAN.)
2. ON THE BASIS OF THE ABOVE INFORMATION John T. Smith
- IS X TO UNDERTAKE GAINFUL EMPLOYMENT, AND HIS CHILDREN ARE X FOR
ABLE UNABLE ELIGIBLE INELIGIBLE
AND UNDER THE CIF CLASSIFICATION.

10/28/44
DATE

Edna Green
SIGNATURE OF COUNTY WORKER

196-05 (Continued)

196-05

FORM CA 240, REVISED NOVEMBER, 1944
STATE OF CALIFORNIA
DEPARTMENT OF SOCIAL WELFARE

FORM CA 240

REPORT ON INCAPACITATED FATHER
AID TO NEEDY CHILDREN

UNDER THE AID TO NEEDY CHILDREN LAW A NEEDY CHILD UNDER THE AGE OF 18 YEARS, WHOSE FATHER IS "INCAPACITATED FOR GAINFUL EMPLOYMENT BY PERMANENT PHYSICAL DISABILITY," SHALL BE CONSIDERED ELIGIBLE FOR AID UNDER THE CLASSIFICATION "CHILD OF AN INCAPACITATED FATHER (CIF)" IF THE CHILD IS OTHERWISE ELIGIBLE.

A. MEDICAL SOCIAL WORKER'S OR COUNTY WORKER'S REPORT (TO BE SUBMITTED TO PHYSICIAN BEFORE EXAMINATION)

1. NAME Smith, John T. AGE 49

2. ADDRESS 1611 - Market Street, Sacramento

3. NATURE OF INCAPACITY (FATHER'S STATEMENT) Leg amputated, ambulatory with crutch.

4. HOME CONDITIONS: Has separate well-heated and ventilated bedroom.
Well-balanced meals prepared by wife.

5. WORK HISTORY

A) WHAT IS MAN'S USUAL OCCUPATION? truck driver

B) HOW LONG SINCE HE HAS BEEN ABLE TO FOLLOW IT? December 1938

C) WHAT KIND OF WORK, IF ANY, HAS HE DONE SINCE ONSET OF PRESENT CONDITION CAUSING INCAPACITY?
Night watchman from Jan. 1930 to March 1940

D) IF MAN BELIEVES HE CAN UNDERTAKE WORK REQUIRING LIMITED PHYSICAL EFFORT, INDICATE TYPE OF
WORK: None

E) IS MAN INTERESTED IN A RETRAINING PROGRAM? no WHAT TYPE? -----

6. ADDITIONAL INFORMATION

Family understands seriousness of father's condition.

Father subject to periods of discouragement but in general
his morale is good.

10/12/44
DATE

E. ana Green
SIGNATURE OF COUNTY WORKER

(FOR REVERSE OF FORM SEE NEXT PAGE)

(Section Continued on Next Page)

**196-80 REMARRIAGE OF MOTHER OF CHILD ELIGIBLE FOR ANC
ANC****196-80**

Aid shall be granted or continued to children otherwise eligible for ANC whose mother remarries, provided:

1. It is for the children's best interest to be placed out of their homes and the parents can not meet the cost of care; or
2. The step-father deserts the family or is separated from the mother; or
3. The step-father is unable to regularly provide support for the children according to the accepted basic ANC standards for adequate care, taking into consideration any special personal or other needs of the step-father. (W&IC 1560)

**196-35 MARRIAGE OF CHILD ELIGIBLE FOR ANC
ANC****196-35**

The marriage of a child under 18 does not in itself render the child ineligible for ANC provided the requirements of the ANC Law are met. (W&IC 1560)

**196-20 REHABILITATION OF TUBERCULOUS OR INCAPACITATED FATHER
(T.B.F. AND C.I.F.)
ANC****196-20**

A father who is unable to be gainfully employed because of his tuberculous condition or her permanent physical incapacity may, in the physician's opinion, be trained for some type of work. Aid may be granted for his children under these classifications, provided they are otherwise eligible, until his training has been completed.

The Bureau of Vocational Rehabilitation, State Department of Education, Sacramento, or any of the branch offices of the Bureau may be consulted for assistance in planning a program of training. (W&IC 1500, 1560)

215-00 (Continued)

215-00

Other than under the automatic restoration procedure outlined above, all points of eligibility in which there may have been any change shall be investigated before aid is restored. The circumstances in each case will determine which eligibility factors will be redetermined but special attention shall be given to the factor which resulted in the previous discontinuance of aid.

When the discontinuance has extended beyond the date when the annual reinvestigation would have been due, had aid been continuous, a complete investigation of all points of eligibility shall be made with the following exception. When certain points of eligibility which do not change have been established once, it is not necessary to reestablish them unless new evidence comes to light which casts doubt on the validity of the proof previously accepted, e.g., age in OAS need not be reinvestigated if it has once been determined to be over 65.

A recipient whose aid is discontinued because of receipt of income may be ineligible for restoration of aid due to excess personal property. Should he make application at a subsequent date his eligibility shall be investigated. Upon verification that the amount of personal property, including any residue from the income received, is within the limit established in the law, aid shall be restored if he is otherwise eligible. The facts must establish that personal property was not reduced for the purpose of qualifying for aid. (SEE SEC. 215-05, APPLICATION OR RESTORATION AFTER DISCONTINUANCE DUE TO EMPLOYMENT, FOR SPECIAL PROVISIONS IN OAS WHEN AID IS RESTORED FOLLOWING DISCONTINUANCE DUE TO EMPLOYMENT.)

In CIF and TBF cases under the ANC program when aid has been discontinued because of incapacitated father or a tuberculous father is gainfully employed and when aid is restored within 12 months from the date of the last medical report, a new medical report on Form CA 240 (Report on Incapacitated Father) for CIF or on Form CA 242 (Report on Tuberculous Father) for TBF need not be obtained if the case record contains supporting evidence of eligibility subsequent to discontinuance in the form of either an oral or written statement from the examining physician.

When ANC is restored after a discontinuance of less than one year for some of the children in the family group and aid has continued for the other eligible children of the family, a complete investigation shall be made of the point resulting in the discontinuance and of any other factors which may have changed. This applies likewise when aid has been discontinued for more than one year for some of the children in a family group, while other children in the family have remained on aid. (SEE SEC. 201-25, WHEN APPLICATION TO BE TAKEN.) (W&IC 1560, 2140, 3075, 3460)

**215-00 RESTORATION OF AID
OAS, ANB, APSB, ANC****215-00**

Restoration is the granting of aid to a former recipient of the same aid in OAS, ANB, APSB, or on behalf of the same child or children in ANC after discontinuance of aid for less than 12 months. (FOR EXCEPTION IN ANC SEE SEC. 201-25, WHEN APPLICATION TO BE TAKEN.) Recommendation for a restoration is submitted to the board of supervisors and the SDSW on a Notice of Change (Form Ag, Bl, CA 232). This shall give in full the reason for restoration of aid. (SEE SECS. 362-30, REPORTING REASON FOR CHANGE ON NOTICE OF CHANGE AND 363-05, RECORDING ON TOP OF FORM AND SEC. 1 OF NOTICE OF CHANGE, ANC.)

Restorations shall be effective as of the first day of the month in which they are acted upon by the board of supervisors unless the status of eligibility requires that the board of supervisors specify a later date. In each instance the board of supervisors shall recommend the date of restoration. (SEE SEC. 611-55, BEGINNING DATE OF AID—RESTORATIONS.)

Whenever aid is discontinued due to the confinement of an OAS, ANB, or APSB recipient or of a child receiving ANC in any public institution, the board of supervisors in its order discontinuing aid may provide that aid be restored without further order of the board of supervisors when the person ceases to be an inmate of the institution. (SEE SECS. 164-10, 164-20, ELIGIBILITY DURING HOSPITALIZATION AND 610-60, PAYMENT TO INMATE OF PUBLIC INSTITUTION.)

To effect this automatic restoration two Forms Ag, Bl, or CA 232 shall be approved on the case. One form orders discontinuance effective as of the last day of the month in which the recipient or the child in ANC is admitted to the institution, or in the case of temporary medical or surgical care, as of the end of the month in which the eligibility period is completed. The second form orders restoration with no date specified. Upon release of the recipient or the child in ANC from the institution the second Form Ag, Bl, CA 232 is completed showing the date of release, and immediately submitted to the SDSW. A warrant is then issued for the balance of the month during which the recipient, or the child in ANC, was not an inmate and claim made on the current monthly payroll. (SEE SEC. 627-40, PARTIAL MONTH CLAIMS-COMPUTATION OF TOTAL AMOUNTS) (W&IC 1560, 2140, 2160.6, 3044, 3075, 3444, 3460)

In ANC the automatic restoration procedure described in the preceding paragraphs shall be used when aid has been discontinued because a child has been confined in a detention home or other public institution or has been temporarily placed in a free home and that home is no longer available.

(Section Continued on Next Page)

235-85 (Continued)

- b. Housing which allows adequate sleeping space, reasonable privacy and complies with sanitary and housing regulations.
 - c. Attendance at school during legal school age for every child who is capable of benefiting by formal education; and vocational training or an opportunity to obtain a higher education when indicated.
 - d. Normal recreational activities and participation in community life.
 - e. Proper supervision in the absence of the mother or caretaker.
2. Provisions for adequate health care. This includes routine physical examinations, preventive measures, correction of defects, hospital and out-patient service, periodic examinations of contacts with tuberculosis and other infectious diseases.
 3. For the child receiving foster care a boarding home meeting requirements for a licensed home, or equivalent standard if living with relatives.
 4. For the children receiving institutional care, the institution shall be one licensed by, or whose standard meets the approval of the SDSW.
 5. Case-work service which insures to each family and child the highest possible morale and security, and the best adjustment to family and community life, and which obtains for them the maximum benefit from community resources for their health, education, recreation and general welfare.

Aid shall not be paid when there is a person with tuberculosis in a communicable stage in the home. (SEE SEC. 195-10, CHILD IN HOME WITH TUBERCULOUS PATIENT, AND SEC. 235-80, VERIFICATION OF CONDITION OF TUBERCULOUS PERSON IN HOME.) Nor shall aid be paid when the child under 16 is in a foster home which does not meet the requirements of a licensed home or, of an equivalent standard if living with relatives.

When children are living with a parent or parents and conditions in the home fail to meet the standard for adequate care, continued efforts shall be made by the county to raise the living standards to a satisfactory level. When the children, despite the county's efforts, continue to be neglected and to live under unsatisfactory conditions, aid shall not be denied or discontinued; but the children shall be referred to the juvenile court for whatever action is deemed necessary for their protection and welfare. (W&IC 1511, 1560)

**235-70 VERIFICATION IN TUBERCULOUS FATHER CLASSIFICATION
ANC****235-70**

Incapacity of a father due to tuberculosis (TBF) shall be established in accord with the policies and procedures set forth in Secs. 195-00, Classification of Child of Tuberculosis Father (TBF), and 195-05, Instructions for Completion of Report on Tuberculous Father (TBF), Form CA 242. The county case record shall clearly indicate that the father is not in fact gainfully employed or able to be gainfully employed in accordance with the provisions of Secs. 195-00 and 195-05. (W&IC 1500, 1560)

**235-75 VERIFICATION OF INCAPACITATED FATHER CLASSIFICATION
ANC****235-75**

Eligibility under the classification of child of incapacitated father (CIF) shall be established in accord with the policies and procedures set forth in Secs. 196-00, Classification of Child of Incapacitated Father (CIF), and 196-05, Instructions for Completion of Report on Incapacitated Father (CIF), Form CA 240. When there is any indication that the father is able to work or is working, there shall be a clear determination in the case record that the father is not in fact gainfully employed or able to be gainfully employed in accordance with the provisions of Secs. 196-00 and 196-05. (W&IC 1500, 1560)

**235-80 VERIFICATION OF CONDITION OF TUBERCULOUS PERSON IN HOME, ANC
ANC****235-80**

When a person other than the father has tuberculosis in a non-communicable stage, medical reports on Form CA 242, Report on Tuberculous Father (completing only Sec. A, Items 1 thru 4 and Sec. B) shall be secured at regular 90-day intervals unless the examining physician recommends, in writing, on the Form CA 242 that the intervals between examinations be extended beyond the 90-day period. If such a recommendation is made, the next report shall be secured on the date of the next examination as given by the physician. (SEE SEC. 195-10, CHILD IN HOME WITH TUBERCULOUS PERSON.) (W&IC 1560)

**235-85 STANDARDS OF ADEQUATE CARE IN ANC
ANC****235-85**

The object and purpose of ANC is to keep children in their own homes wherever possible, and to provide the best substitute for their own homes for those children who must be given foster care. Counties are responsible for making available the individual services required for the general welfare of each family and child.

Adequate care for children implies a satisfactory standard of living. This includes:

1. An adequate budget which will insure:
 - a. Clothing and food of adequate quantity and quality, including special diets when ordered by a physician.

(Section Continued on Next Page)

351-57 (Continued)

351-57

2. After verification of the necessary items, a letter of recommendation should be written by the county welfare department for presentation to the board of supervisors for action.
3. Notification of the board of supervisors' action is to appear on this written recommendation which is to be retained in the county file.
4. If the request for change from one program of Aid to the Blind to the other is denied, Form Bl 239 (Notification of the Action of the Board of Supervisors) should be forwarded to the recipient as notification of the action taken by the county board of supervisors; a copy of Form Bl 239 should be forwarded to the SDSW. (SEE SECS. 250-00, DISPOSAL OF APPLICATIONS; 250-05, REPORTING ACTION ON APPLICATION TO SDSW; 250-10, REPORTING ACTION OF THE BOARD OF SUPERVISORS TO APPLICANT)
5. If the request to change is approved, a Notice of Change (Form Bl 232) should be submitted to the SDSW showing the action of the board of supervisors, discontinuance date under the one chapter, beginning date under the other chapter and the amount of aid recommended. (Form Bl 239 will be sent to the recipient, but it is not necessary that a copy of this form be sent to the SDSW when a change in the type of aid is approved.) (SEE SEC. 362-30, REPORTING REASON FOR CHANGE ON NOTICE OF CHANGE.)

The recipient need only be required to furnish information concerning those items which will require additional verification to determine his eligibility for the aid requested.

Verification of eligibility for a transfer from ANB to APSB, in addition to that already completed for ANB, must include the following:

1. Verification of residence in California for a period of 10 years immediately preceding the filing of the request for a change of aid; or
Verification of evidence that the recipient became blind while a resident of California.
2. Verification of the recipient's plan for achieving self-support; and
3. Verification of income.

If a recipient of APSB requests a transfer to ANB, determination should be made of the existence of need in excess of the grant together with verification of income, if any.

(Section Continued on Next Page)

**351-45 REINVESTIGATION FOR COUNTY HOSPITAL CLAIMS
OAS****351-45**

Reinvestigation of eligibility in accordance with the provisions of this chapter shall be made by the county for each person for whom payment of the county hospital subvention is claimed. (SEE SEC. 165-00, PAYMENT TO COUNTY UNDER W&IC SEC. 2160.7) Since such person is not himself receiving aid, no request that he sign the Recipient's Affirmation of Eligibility (Form Ag 206) is necessary. A report of any changes in his financial circumstances or his income shall be secured through interview with the person and shall be recorded in the case record. (W&IC 2140, 2160.7, 2184)

**351-50 REINVESTIGATION OF BLINDNESS
ANB, APSB****351-50**

In ANB and APSB, the degree of blindness of the recipient shall be re-determined annually by a physician skilled in diseases of the eye unless the State ophthalmologist has advised a reexamination is not necessary. It is desirable, if possible, that reexamination be made by a physician who has not previously examined the recipient. (SEE SEC. 180-50, REEXAMINATION OF EYES TO DETERMINE CONTINUED ELIGIBILITY. (W&IC 3050, 3075, 3089, 3460))

**351-55 REDETERMINATION OF ELIGIBILITY UNDER ANB OR APSB
PROGRAM
ANB, APSB****351-55**

When aid has been granted under the ANB or APSB Program, the county shall redetermine annually whether the recipient shall for the ensuing year receive aid under the ANB or APSB program. (SEE SEC. 233-50, VERIFICATION OF PLAN FOR SELF-SUPPORT.) (W&IC 3075, 3083.5, 3460, 3473)

**351-57 TRANSFER PROCEDURE FROM ANB TO APSB, OR VICE VERSA
ANB, APSB****351-57**

When an application for ANB is granted, the recipient may transfer to APSB at any time. On the other hand, when an application for APSB is granted, a recipient is not eligible for ANB for a period of one year from the date of application for APSB. (W&IC 3075, 3083.5, 3460, 3473)

Subject to the restrictions included in the above paragraph, the recipient may indicate his desire to transfer from ANB to APSB, or vice versa. It is not necessary for the county to complete a new application or Certificate of Eligibility when a transfer from one chapter of Aid to the Blind to the other is effected. However, the request for transfer from one chapter to the other should be recorded in the county file. In order to eliminate an additional form, the following procedure shall be used:

1. A written or a signed request for a change from one program of Aid to the Blind to the other should be obtained from the recipient and appended to the original application.

(Section Continued on Next Page)

351-60 (Continued)

351-60

EXAMPLE B: IT IS KNOWN TO THE COUNTY OVER CONSIDERABLE PERIOD THAT THE INCAPACITATED FATHER WAS LIVING WITH HIS PARENTS. AT TIME OF REINVESTIGATION IT IS LEARNED THAT HE LEFT THIS HOME AND HAS GONE TO ARIZONA TO BE WITH HIS SISTER. AID CONTINUES FOR A PERIOD NOT TO EXCEED 90 DAYS BEYOND THE DATE OF ANNUAL REINVESTIGATION TO ENABLE THE COUNTY TO SECURE THE NECESSARY MEDICAL REPORT.

3. Under the CIF classification when the original physician's report indicates permanent incapacity which prevents the father from engaging in any occupation and the record consistently indicates that his physical condition is unchanged.

EXAMPLE C: THE FATHER HAD BEEN DECLARED PERMANENTLY INCAPACITATED AFTER AN INJURY WHICH RESULTED IN A PARALYSIS. THE FATHER IS BEDFAST AND THE PHYSICIAN REPORTED THAT NO IMPROVEMENT COULD BE EXPECTED. THE WORKER SEES THE FATHER DURING HOME VISITS AND OTHER MEMBERS OF THE FAMILY REPORT ON THE FATHER'S CONDITION AT DIFFERENT TIMES. ALL OF THIS INFORMATION IS NOTED IN THE CASE RECORD AND INDICATES THE FATHER'S CONDITION REMAINS UNCHANGED.

(SEE SECS. 195-00, CLASSIFICATION OF CHILD OF TUBERCULOUS FATHER (TBF), 195-05, INSTRUCTIONS FOR COMPLETION OF REPORT ON TUBERCULOUS FATHER (TBF), FORM CA 242, 196-00, CLASSIFICATION OF CHILD OF INCAPACITATED FATHER (CIF), 196-05, INSTRUCTIONS FOR COMPLETION OF REPORT ON INCAPACITATED FATHER (CIF), FORM CA 240) (W&IC 1500, 1501, 1560)

When aid is granted under the PCI classification, the parent's presence in the institution or his status such as parole, discharge, or escape therefrom shall be verified. (SEE SECS. 193-30, CLASSIFICATION OF HALF-ORPHAN, PARENT COMMITTED TO INSTITUTION, (PCI) AND 235-55, VERIFICATION OF HALF-ORPHAN, PARENT COMMITTED TO INSTITUTION CLASSIFICATION.)

When aid is granted under WFO, Illeg., or Abd. Classification, eligibility from the standpoint of classification is a continuing process. All clues concerning the parents whereabouts must be followed up and every effort must be made to locate the parent, parents or alleged father and to place responsibility. This does not apply to children declared abandoned by the court.

When a change in classification occurs, eligibility under the new classification shall be established in accordance with the requirements for that classification; e.g., a change from TBF to whole-orphan classification. (SEE CHAPTER 190-00, CLASSIFICATION FOR ELIGIBILITY REQUIREMENTS) (W&IC 1500, 1501, 1560)

FILED

In the office of the Secretary of State
of the State of California

DEC 4 - 1944

FRANK M. JORDAN, Secretary of State

By *[Signature]*
Deputy

351-57 (Continued)

351-57

If a reinvestigation is due at the time of the transfer from ANB to APSB, or vice versa, full information shall be secured and the Recipient's Affirmation of Eligibility (Form B1 206) should be completed by the recipient and county worker. (W&IC 3075, 3083.3, 3460, 3471.5)

(SEE SECS. 350-20, REINVESTIGATIONS, ANB, APSB LAW, 351-05, DATE OF REINVESTIGATION, 351-10, REQUIREMENTS OF REINVESTIGATION, 351-11, COMPLETION OF AFFIRMATION OF ELIGIBILITY, 351-12, HOME VISIT DURING REINVESTIGATION, 351-15, REINVESTIGATION OF REAL PROPERTY, 351-80, REINVESTIGATION OF PERSONAL PROPERTY, 351-25, REINVESTIGATION OF INCOME, 351-30, REINVESTIGATION OF RELATIVES, 351-35, REINVESTIGATION OF LIVING ARRANGEMENTS, 351-50, REINVESTIGATION OF BLINDNESS, 352-20, RECORDING OF REINVESTIGATION IN ANB AND APSB, 352-25, NOTIFICATION OF SDSW OR COMPLETION OF REINVESTIGATION.)

351-60 REINVESTIGATION OF CLASSIFICATION ANC

351-60

The county shall determine if there has been any change in the basis for the classification of a child receiving ANC and the date of such change, if any.

When aid is granted under the TBF or CIF classification, aid may not continue beyond the due date of the annual reinvestigation without a physician's report establishing continuing eligibility with the following exceptions:

1. When unsettled conditions in a foreign country make it difficult to secure medical reports on the incapacitated or tuberculous father, aid may be continued beyond the due date of the annual reinvestigation without the required medical form when the disability may reasonably be expected still to exist.

EXAMPLE A: THE CASE RECORD CONTAINS MEDICAL REPORTS AND OTHER EVIDENCE SHOWING THE FATHER HAS A SERIOUS HEART CONDITION AND HE HAS BEEN DECLARED PERMANENTLY INCAPACITATED. LETTER FROM THE FATHER OR RELATIVES TO HIS FAMILY INDICATE HIS CONDITION HAS NOT IMPROVED AND ACTIVITY CONTINUES TO BE LIMITED. UNDER SUCH CIRCUMSTANCES IT MAY REASONABLY BE EXPECTED THAT HIS DISABILITY STILL EXISTS.

2. When the record indicates that the county has shown due diligence in an effort to secure the medical report and there is reason to believe the disability still exists, aid may be continued beyond the due date of the annual reinvestigation for a period not to exceed 90 days.

(Section Continued on Next Page)